Tenmast Software

Making Your Job Easier!

WinTen² Master Setup

Preliminary User Manual

User Manual Edition: 5/26/2005

Your inside track for making your job easier!

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Table of Contents

Part I: Introduction

CHAPTER 1 Overview

The WinTen² Master Setup program controls your agency's security permissions, which govern what any individual can see or do in any WinTen² program. It also contains information on your data areas and on all of the WinTen² programs your agency uses. It controls various high-level settings that affect how your WinTen² programs interact with each other.

This chapter provides an overview of the program. Topics addressed include:

- *Features List*
- *Master Setup Process*
- *Program Integration*
- *Master Setup Main Menu*
- *Online Help*

Features List

Here are just some of the ways Master Setup makes your job easier.

Custom-Defined Security Roles

Security roles determine what any individual can see or do in any WinTen² program. Your agency can define your own roles, based on your agency's size, your business processes, and your security considerations.

Built-In Tasks and Task Groups

Tasks and task groups defined for each WinTen² program make it easy for you set permissions for security roles.

Browse Screens and Drill-down

Browse screens with expanded sorting, filtering, and searching options help you find existing records more easily. You can also drill down to find related records. Expanded drill-down features provide many different ways to get to the same data.

Wizards

WinTen² programs feature expanded use of wizards to guide you through complex processes. Master Setup includes a number of wizards to help you create records.

Keyboarding Options

With WinTen² programs, you can choose to use your computer's mouse or speed data entry by using expanded keyboard shortcuts. You have the option of navigating through Master Setup, entering data, and executing commands by using the keyboard almost exclusively.

Master Setup Process

Here is a typical Master Setup process for most agencies.

> **Note:**
> ***Your process may differ slightly, depending on your agency's procedures.***

Master Setup contains installation and status information on each of your data areas and on each WinTen² program your agency uses. It also controls your agency's security permissions, which govern what any individual can see or do in any WinTen² program. Three elements – data areas, security roles, and user accounts – combine to make up your security permissions. The functions of the Master Setup program revolve around these four things: programs, data areas, roles, and users.

Your first step in using Master Setup is to plan and set up your programs and data areas. You will create one record in Master Setup for each WinTen² program your agency uses and one record for each of your data areas. (Most agencies do this in close consultation with Tenmast when first upgrading to or installing WinTen². After these records are set up, you will rarely need to change them.)

> **Hint:**
> *For information on data areas, see* Plan Data Areas*.*

After you have set up your programs and data areas, you will next plan and define the security roles you wish to use. Each security role is based on a particular job function. Each role groups together multiple security permissions (or "task privileges"), so that you can grant them to a user – or revoke them from a user – simultaneously. (As with programs and data areas, you will seldom need to change roles after you have set them up. You will usually change them only if you change your business processes.)

For each role, you will define each WinTen² program the role has rights to use. For each program within the role, you will define the specific tasks the role can perform in that program. To save time, built-in "task groups" allow you to enable multiple, related tasks at once.

> **Hint:**
> *For information on security roles and tasks, see* Plan Security Roles *and the* Tasks, Task Groups, and Security Roles *appendix to this manual.)*

Finally, you will maintain one user record for each employee who uses a WinTen² program. Each user's record will contain the user name and password the person uses to log into any program.

For each user, you will also define each data area to which the user has access. For each of the user's allowed data areas, you will define the security role(s) the user has in that data area.

As employees join or leave your agency, or as employees change job functions, you will edit your user records as needed to keep them up to date. This will typically involve adding new user records for new employees, disabling user records of former employees, and/or changing users' security roles. You may also need to update or reset user passwords from time to time.

Program Integration

Master Setup integrates directly with all other WinTen² programs and is required for them to function. The purpose of Master Setup is to control security permissions, which govern what any individual can see or do in any WinTen² program, and to control various high-level settings that affect how the other programs interact with each other.

No other WinTen² program is required in order for Master Setup itself to function.

Master Setup Main Menu

The Main Menu screen is the first thing you see when you start the Master Setup program. It is your starting point for using Master Setup's five main functions: **Maintain Roles**, **Maintain Users**, **Maintain Installed Programs**, **Maintain Data Areas**, and **Setup**. We will discuss each of these in detail later in this manual.

This screen also gives you access to two additional options: **Version Date** and **Exit**.

Version Date

The Version Date tells you what version of the program you are running. Use it to learn if a newer version of the program is available and/or to troubleshoot problems with the program.

To See the Version Date:

✓ Click the Information button or click Help menu > About.

Exit

The Exit option closes the Master Setup program.

To Exit Master Setup:

✓ Press Esc, press X, or click the Exit button.

Online Help

The Master Setup program includes context-sensitive Help, which is an online version of this user manual. You can start Help from anywhere in the program.

Help is divided into pages called “topics.” When you start Help, you will go to a list of topics that correspond to where you are in the Master Setup program. You can choose one of those suggested topics or use Help’s Contents, Index, and Search tabs to find other topics.

To Start Help:

✓ Press F1 or click Help menu > Contents.

Part II:
Tenmast Best Practices

CHAPTER 2

Cyclical Actions

For most agencies, cyclical activity in the Master Setup program includes only an annual review of information.

Review Master Setup Annually

At least once each calendar year, the administrator of your WinTen² programs should review all of your information in Master Setup. If you have any questions, you may contact Tenmast Support at (877) 359-5492 or support@tenmast.com.

CHAPTER 3

Manage Records with Browse, Maintain, and Select Screens

Several different types of screens appear throughout WinTen² programs. Menu screens allow you to navigate within a program. **Browse screens**, **maintain screens**, and **select screens** make it easy for you to create, find, view, and edit records. A **wizard** is a special collection of screens. Some wizards help you create certain types of records; others help you process existing records.

This chapter will help you become familiar with the purpose and behavior of each type of screen and with some of the common icons and options found on them. We will also discuss using these screens to find information in Master Setup.

Topics addressed include:

- *Identify Types of Screens*
- *Use Common Screen Icons*
- *Use Browse and Select Screens*

Identify Types of Screens

The different types of screens have different purposes and, for that reason, different appearances and distinctive features. You can use these features, as well as the screen titles, to help you identify screen types.

Menu Screens

A menu screen allows you to navigate within a program. Menu screens are easy to recognize because they show only a collection of buttons. Each button takes you to a different area or function of the program.

There are two menu screens in Master Setup: the Main Menu screen and the Setup screen. The Main Menu screen is the first thing you see when you start Master Setup. It gives you access to all of Master Setup's functions. The Setup button on the Main Menu screen takes you to the Setup screen. It gives you access to all of the program's Setup options.

Browse Screens

The main purpose of browse screens is to help you find records quickly and easily. You can identify browse screens by a set of option fields at the top of the screen and, below them, a table of records.

Many browse screens have the View, Ordered By, and Search For option fields at the top of the screen. These fields allow you to find a specific record quickly without having to scroll through all of them. (See *Use Browse and Select Screens*.)

The table of records on a browse screen allows you to view and select records. Each row of the table is a different record. The columns of the table provide a subset of the records' most important information.

If you select a record on a browse screen, you can use the edit feature (press Ctrl+E or click the Edit icon) to open it on a maintain screen. You can usually delete a record directly from a browse screen by selecting it and then pressing Ctrl+D or clicking the Delete icon. Using the Add feature (pressing Ctrl+A or clicking the Add icon) on a browse screen opens either a maintain screen or a wizard that you can use to create a new record.

Maintain Screens

A Maintain screen contains all the fields of information for a single record, sometimes spread across multiple tabs and/or sub-tabs. Maintain screens allow you to add, view, edit, or delete individual records.

Because different kinds of records contain different fields of information, maintain screens vary greatly from one to another. You can recognize them because they have many different fields for one record. Maintain screens do not have the View, Ordered By, or Search For option fields at the top of the screen.

Maintain screens have tabs and/or sub-tabs when a certain kind of record has more data fields than will fit on the screen at one time. Tabs appear near the upper left of the screen, just below the title bar and menu bar. If a tab has sub-tabs, they appear at the lower left. Not all Maintain screens have tabs or sub-tabs.

You can sometimes open a maintain screen directly from a menu screen (e.g., for some Setup options), but you will open most maintain screens by first editing or adding a record from a browse screen.

> **Note:**
> ***Some types of records use wizards to walk you through the creation of a new record. In those instances, you will create new records in the wizard, but view and edit individual records on a maintain screen.***

Select Screens

Select screens are very similar to browse screens, but have a different purpose. Select screens help you select the value of a specific field when adding or editing records.

Whenever you see a field with a lookup icon on a maintain screen or in a wizard, you will use a select screen to choose the value of that field. Pressing F4 from the field or clicking its lookup icon will open its select screen. (See *Use Browse and Select Screens*.)

You can recognize select screens by a set of option fields (often View, Ordered By, and Search For) at the top of the screen and the Select and Cancel buttons at the bottom of the screen.

Wizards

A wizard is a special collection of screens called "steps." Some wizards help you create certain types of records; others help you process existing records. To complete a wizard, you must go step-by-step through each screen.

Wizards are very easy to recognize. They have Start, Back, Next, and/or Finish buttons at the bottom of each screen. The titles of wizard screens (see *Reading Screen Titles*, below) all contain the word "Wizard." Each title also tells you which step you are on and how many steps are in the wizard (e.g., "Step 2 of 5").

You can start some wizards manually from browse or maintain screens. If a wizard is available, you will see both a Wizards menu and a Wizards icon (a blue wizard's hat) near the top of the screen.

> **Hint:**
> *The Wizards menu and Wizards icon provide duplicate functionality. You can start any available wizard using either option. If you prefer to use the keyboard, press Alt+Z to open the Wizards menu; if you prefer using the mouse, click the drop-down arrow immediately after the Wizards icon.*

Some wizards start automatically when you add a new record (press Ctrl+A or click an Add icon). Depending on the kind of record you are adding, you will go to either a wizard or a maintain screen.

The Master Setup program includes many different wizards for creating and processing records. This manual will walk you step-by-step through each of them.

Reading Screen Titles

Every screen has a title, which appears in the title bar, the dark blue bar across the top of the screen.

The first word of the screen title often identifies the screen type. The titles of browse screens usually begin with "Browse," maintain screens with "Maintain," and select screens with "Select." Not all Browse screens, however, have the word "Browse" in the title. Those that do not usually do have "Search" or "Detail" somewhere in the title. All wizards have the word "Wizard" somewhere in the title of each screen.

Use Common Screen Icons

Icon bars appear near the top of browse, maintain, and select screens. An icon bar is a collection of icons, each of which performs some action.

We have already mentioned the Add, Delete, Edit, and Wizards icons in this chapter. Three other icons bear discussing here: **Prior**, **Next**, and **Search**.

> **Hint:**
> *We will discuss other icons as needed throughout this manual. For a more complete list of icons and their keyboard shortcuts, see the* Keyboard Actions *appendix to this manual.*

Prior and Next

The Prior and Next icons allow you to move from one record to another. They appear on browse, maintain, and select screens. To activate them, click the icon or press Ctrl+P or Ctrl+N, respectively.

> **Hint:**
> *If a maintain screen has more than one tab, these icons may not appear on all tabs.*

Search

The search icon appears on most maintain screens. It closes the current maintain screen and takes you to the corresponding browse screen so you can search for another record. Click the icon or press Ctrl+H to activate it.

Use Browse and Select Screens

Browse screens help you find records quickly and easily so you can view, edit, or process them. Select screens help you select the value of a specific field when adding or editing records.

Topics addressed in this section include:

- *Browse and Select Screen Fields*
- *Browse and Select Screen Navigation*

Browse and Select Screen Fields

Many browse and select screens have three option fields at the top of the screen: **View**, **Ordered By**, and **Search For**. Some screens do not have the View field.

> **Hint:**
> *You can read the fields together as a sentence. For example, you might "View active users ordered by name [and] search for Mary Williams."*

View

The View field is a drop-down list that lets you restrict or filter the records you are seeing, typically based on some category or status.

On the Browse Users screen, for example, you can view "Active Users" or "Inactive Users." The default will be the most common view option. In our example, the default is "Active Users."

To Change the View Option:

✓ Tab or click to the View field and choose a value that you want to see.

Ordered By

The Ordered By field is also a drop-down list; it lets you change the sort order of your records. The options in this field correspond to the columns of information on the screen.

There are two ways for you to change the sort order: change it at the Ordered By drop-down list or click any column header on the screen. Like the View field, the default for the Ordered By field will be the most common sort order.

To Change the Sort Order:

✓ Tab or click to the Ordered By field and choose a value on which to sort.
OR
Click any column header on the screen.

Search For

The Search For field lets you type a value and press Enter to search for the first match in your list. Your choices for the other option fields affect the behavior of the Search For field:

- You can search only for records that are currently showing, based on the View field.
- The value you search for must correspond to what is in the Ordered By field.

  If you order by name, for example, you must type a name as your search. If you order by initials, you must type initials as your search.

You can type the complete search value or only the first few characters.

Activate the search by pressing Enter or clicking the Go button.

The program will find the first match for what you type. If the record you want is not the first match, it should be nearby; press DownArrow to move down the table one record at a time until you find the one you want.

To Search for a Record:

- ✓ Verify your choices for the View and Ordered By fields. Remember, you will search only visible records for a value corresponding to your choice in the Ordered By field.
- ✓ If necessary, tab or click to the Search For field.
- ✓ Type the first few characters (one or more) of the value you want to find.
- ✓ Press Enter or click the Go button.
- ✓ If necessary, press DownArrow to select your choice.

Browse and Select Screen Navigation

The behavior of browse and select screen fields helps you find the record you want as quickly and easily as possible, sometimes with as few as four or five keystrokes.

When you open a browse or select screen, the active field will be Search For (your cursor will be flashing there). As mentioned above, the View and Ordered By fields each default to their most common option.

This means that most often you can simply type the first few characters of what you want to find and press Enter.

This technique will find the first match for what you typed. The more specific you are with your search (the more characters you type), the more likely you will “land on” your desired record immediately. If you do not find your desired record immediately, press DownArrow to choose it.

Once you have found your record, you will most often press Ctrl+E to open it. (If you are on a select screen, you will press Alt+T to select it.)

CHAPTER 4

Maintain Installed Programs

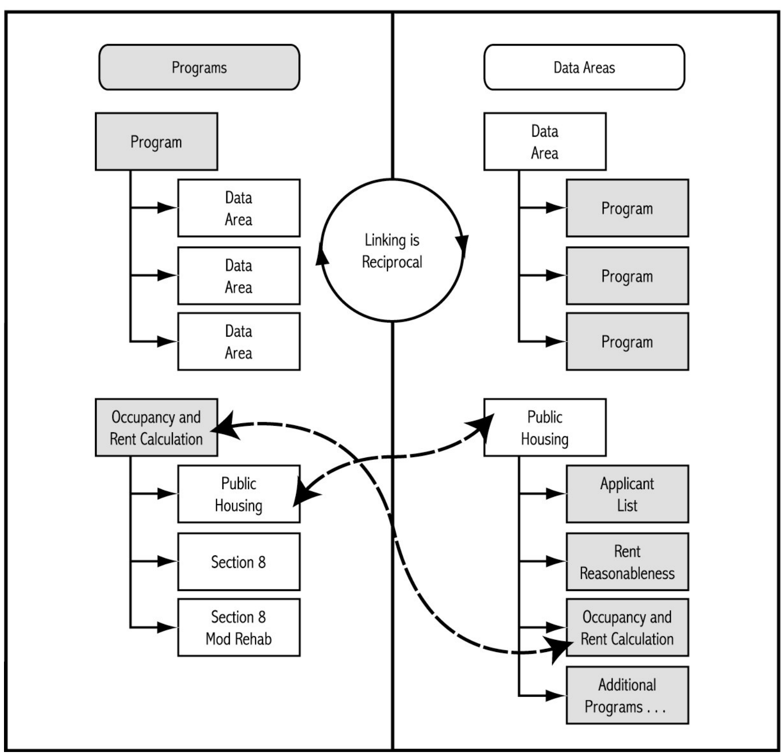
Master Setup contains one record for each WinTen² program your agency uses.

> **Caution:**
> ***Please use extreme caution when modifying your program records. Your agency should maintain this information only in direct consultation with Tenmast staff.***

Each program is installed in one or more of your agency's data areas. (See *Maintain Data Areas*.) Each program record lists the data areas in which it is installed.

> **Hint:**
> *Each data area record, likewise, lists all of the programs installed in that data area. This "linking" or "mapping" of programs and data areas is reciprocal. If you wish to change the linkage, you can do so by editing either the program record(s) or the data area record(s); you do* not *need to do both. Choose whichever option is more convenient at the time.*
>
> *In other words, editing the data areas within a program record will automatically change the records for all affected data areas. In the same way, editing the programs within a data area record will also change the records for all affected programs.*

Programs and Data Areas



Most agencies plan and set up their programs and data areas in close consultation with Tenmast when first upgrading to or installing WinTen². When creating these records initially, the process is often easier if you add the program records first. As you add each data area, you can then select the programs installed in it. After these records are set up, you will rarely need to change them.

Topics addressed in this chapter include:

- *Add Programs*
- *Edit Programs*
- *Delete Programs*

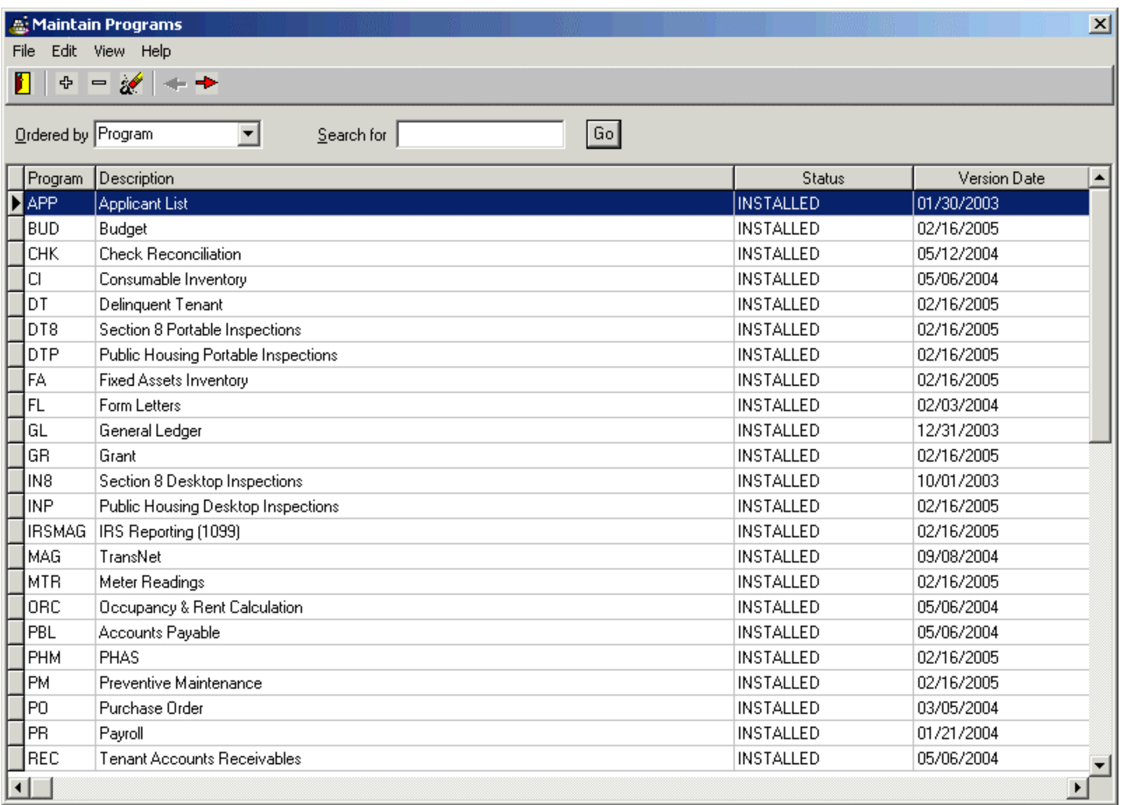
You can use the Browse Programs Screen to view and find your agency's program records.

You can use the Maintain Programs Screen to maintain your program records and to view their detailed information.

To Open the Browse Programs Screen:

✓ Press P or click the Programs button on the Main Menu.

Browse Programs Screen



The Browse Programs screen contains a table of all the WinTen² programs your agency uses. Each program contains four non-editable data fields: **Program**, **Description**, **Status**, and **Version Date**.

> *For related, general help on using a browse screen, see* Manage Records with Browse, Maintain, and Select Screens.

This screen also gives you access to the Maintain Programs screen, which lists the data areas in which each program is installed. (For information on using this screen, see *Edit Programs*.)

Program and Description

You can identify each program by its program code and text description.

Status

Tenmast staff sometimes use program status information when helping you with issues or problems that occur in your WinTen² programs.

Version Date

The Version Date tells you what version of each program you are running. Use it to learn if a newer version of a program is available and/or to troubleshoot problems with a program.

To Open the Maintain Programs Screen:

✓ Edit a program (press Ctrl+E or click the Edit icon) on the Browse Programs screen.

Add Programs

You will use the Add Program Wizard to add program records.

> **Note:**
> ***The Add Program Wizard includes only basic program information. After you add a program, you must identify the data areas in which the program is installed. You can do this in one of two ways:***
>
> ***1. If you are setting up your program and data area records upon initially upgrading to or installing WinTen², first add all of your program records and then add all of your data area records. Select the appropriate programs within each data area in the Add Data Area Wizard. (See*** **Add Data Areas.*****)***
>
> ***2. If you are adding an individual program, first complete the Add Program Wizard. Then, if necessary, verify that all of the program's data areas have also been added. (See*** **Maintain Data Areas*****.) Then edit the program record to identify each data area in which it is installed. (See*** **Edit Programs*****.)***

To Start the Add Program Wizard:

✓ Press Ctrl+A or click the Add icon on the Browse Programs screen.

✓ See *Use the Add Program Wizard*.

Use the Add Program Wizard

The Add Program Wizard will guide you through two steps to add a program:

- *Step 1: Add Program*
- *Step 2: Confirmation*

We will walk through these steps separately.

To Move to the Next Step:

✓ Press PageDown or click the Start or Finish button.

To Move to the Previous Step:

- ✓ Press PageUp or click the Back button.

To Cancel the Wizard at Any Time:

- ✓ Press Esc or click the Cancel button.

> **Hint:**
> *Until you finish the last step, you can go back and change any information you have entered.*

Step 1: Add Program

This step allows you to select the program and enter its version date.

Step 1 contains two data fields: **Program** and **Version Date**. Both are required.

Program

This field provides a list of all WinTen²' programs that are not already listed in Master Setup as installed. Select the program you wish to install.

Version Date

Verify or enter the version date of the program.

To Complete Step 1:

- ✓ Tab or click through the fields, entering the program and version date.
(Both are required.)
- ✓ Press PageDown or click the Start button to go to the next step of the Add Program Wizard (*Step 2: Confirmation*).

Step 2: Confirmation

Step 2 allows you to confirm all of the information before you finish adding this program. The fields on this screen are not editable.

To Complete Step 2:

- ✓ If anything is incorrect, press PageUp or click the Back button to go to the previous step and correct it.
- ✓ If everything is correct, press PageDown or click the Finish button to finish adding this program.

As noted above, the Add Program Wizard includes only basic program information. After you add a program, you must identify the data areas in which the program is installed. You can do this in one of two ways:

1. If you are setting up your program and data area records upon initially upgrading to or installing WinTen², first add all of your program records and then add all of your data area records. Select the appropriate programs within each data area in the Add Data Area Wizard. (See *Add Data Areas*.)
2. If you are adding an individual program, verify that all of the program's data areas have also been added. (See *Maintain Data Areas*.) Then edit the program record to identify each data area in which it is installed. (See *Edit Programs*.)

To Add Another New Program:

- ✓ Press Ctrl+A or click the Add icon to restart the Add Program Wizard.
- ✓ See *Use the Add Program Wizard*.

Edit Programs

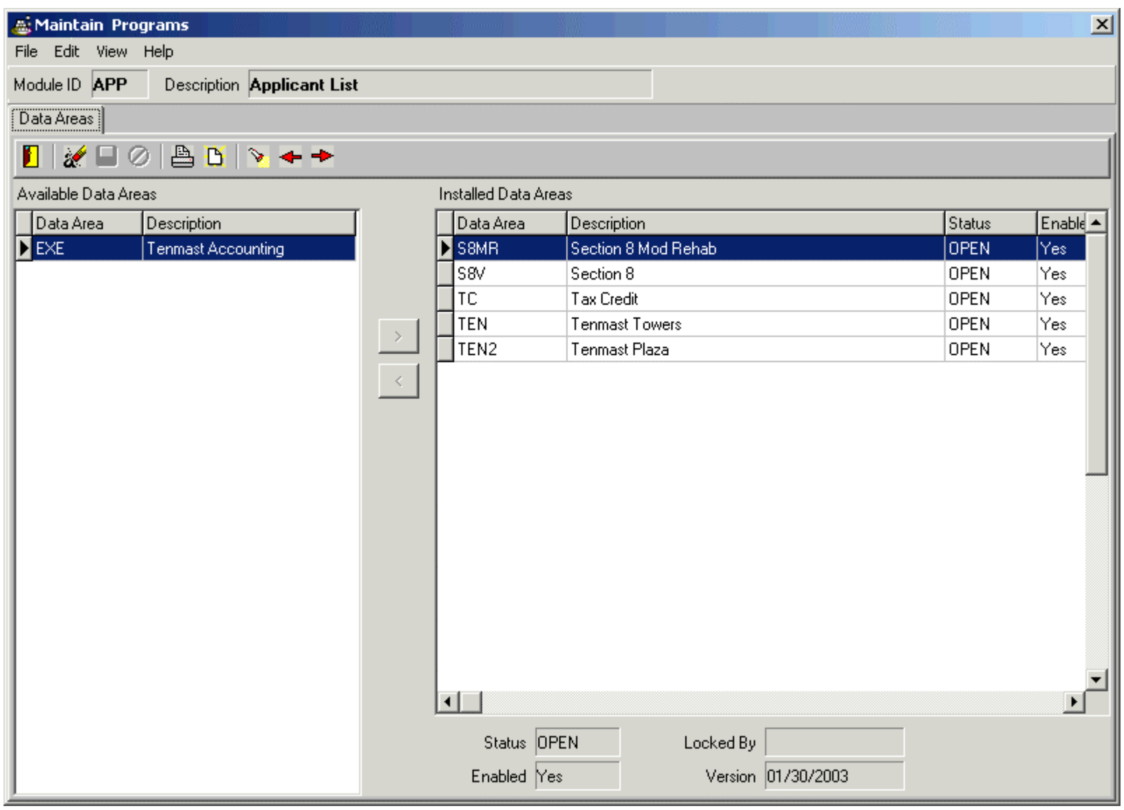
You can use the Maintain Programs Screen to view the data area(s) in which any program is installed. You may occasionally, although rarely, need to edit this information.

> **Caution:**
> ***Please use extreme caution when modifying your program records. Your agency should maintain this information only in direct consultation with Tenmast staff.***

To Open the Maintain Programs Screen:

- ✓ Edit a program record (press Ctrl+E or click the Edit icon) on the Browse Programs screen. (See *Manage Records with Browse, Maintain, and Select Screens*.)

Maintain Programs Screen



The Maintain Programs screen has two non-editable fields at the top to identify the selected program.

This screen also contains two tables: **Available Data Areas** and **Installed Data Areas**.

The Available Data Areas table, on the left, displays all of your agency's data areas in which the selected program *is not* installed.

The Installed Data Areas table, on the right, shows all the data areas in which the selected program *is* installed.

To Install a Data Area:

- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Select a data area in the Available Data Areas table on the left.
- ✓ Press Alt+DownArrow or click the Add Data Area button to add this data area to the program.
- ✓ If necessary, repeat to add additional data areas. The program's data areas appear in the Installed Data Areas table on the right.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

To Uninstall a Data area:

> **Caution:**
> ***It is* extremely important *that you do* not *remove data areas from programs, expect in direct consultation with Tenmast staff.***

- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Select a data area in the Installed Data Areas table on the right.
- ✓ Press Alt+UpArrow or click the Remove Data Area button to remove this data area from the program.
- ✓ If necessary, repeat to remove additional data areas.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

Delete Programs

You may occasionally, although very rarely, wish to delete a program record.

You can delete program records from the Browse Programs screen.

> **Caution:**
> ***It is* extremely important *that you do* not *delete program records, expect in direct consultation with Tenmast staff.***

To Open the Browse Programs Screen:

- ✓ Press P or click the Programs button on the Main Menu.

To Delete a Program Record:

- ✓ Select the program you wish to delete on the Browse Programs screen.
- ✓ Press Ctrl+D or click the Delete icon.
- ✓ Press Y or click the Yes button to confirm the deletion.

CHAPTER 5

Maintain Data Areas

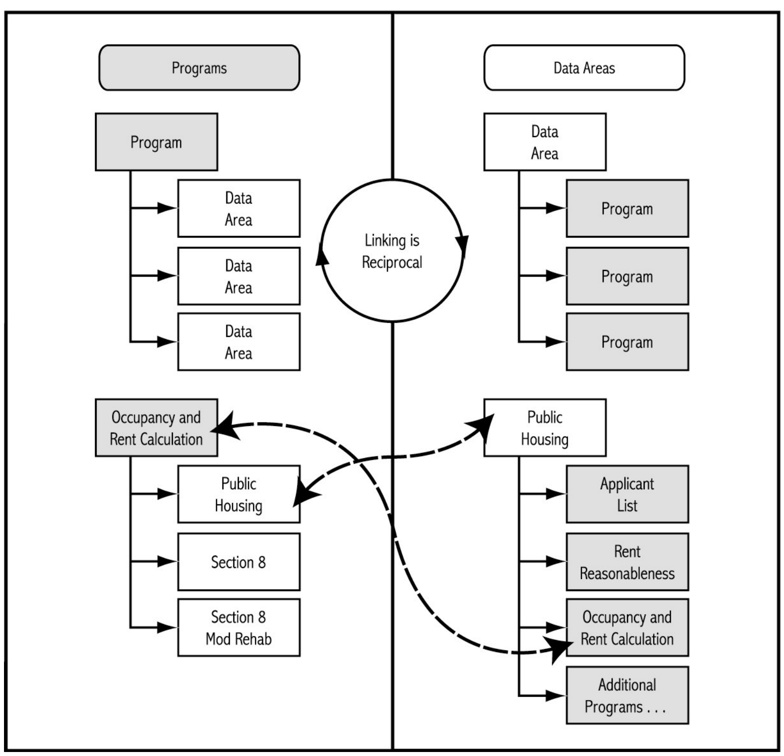
Master Setup contains one record for each of your agency's data areas. (See *Plan Data Areas*.)

> **Caution:**
> ***Please use extreme caution when modifying your data area records. Your agency should maintain this information only in direct consultation with Tenmast staff.***

Each data area has one or more programs installed in it. (See *Maintain Installed Programs*.) Each data area record lists the programs installed in that data area.

> **Hint:**
> *Each program record, likewise, lists all of the data areas in which that program is installed. This "linking" or "mapping" of programs and data areas is reciprocal. If you wish to change the linkage, you can do so by editing either the program record(s) or the data area record(s); you do* not *need to do both. Choose whichever option is more convenient at the time.*
>
> *In other words, editing the data areas within a program record will automatically change the records for all affected data areas. In the same way, editing the programs within a data area record will also change the records for all affected programs.*

Programs and Data Areas



Most agencies plan and set up their data areas and programs in close consultation with Tenmast when first upgrading to or installing WinTen^2. When creating these records initially, the process is often easier if you add the program records first. As you add each data area, you can then select the programs installed in it. After these records are set up, you will rarely need to change them.

Topics addressed in this chapter include:

- *Add Data Areas*
- *Edit Data Areas*

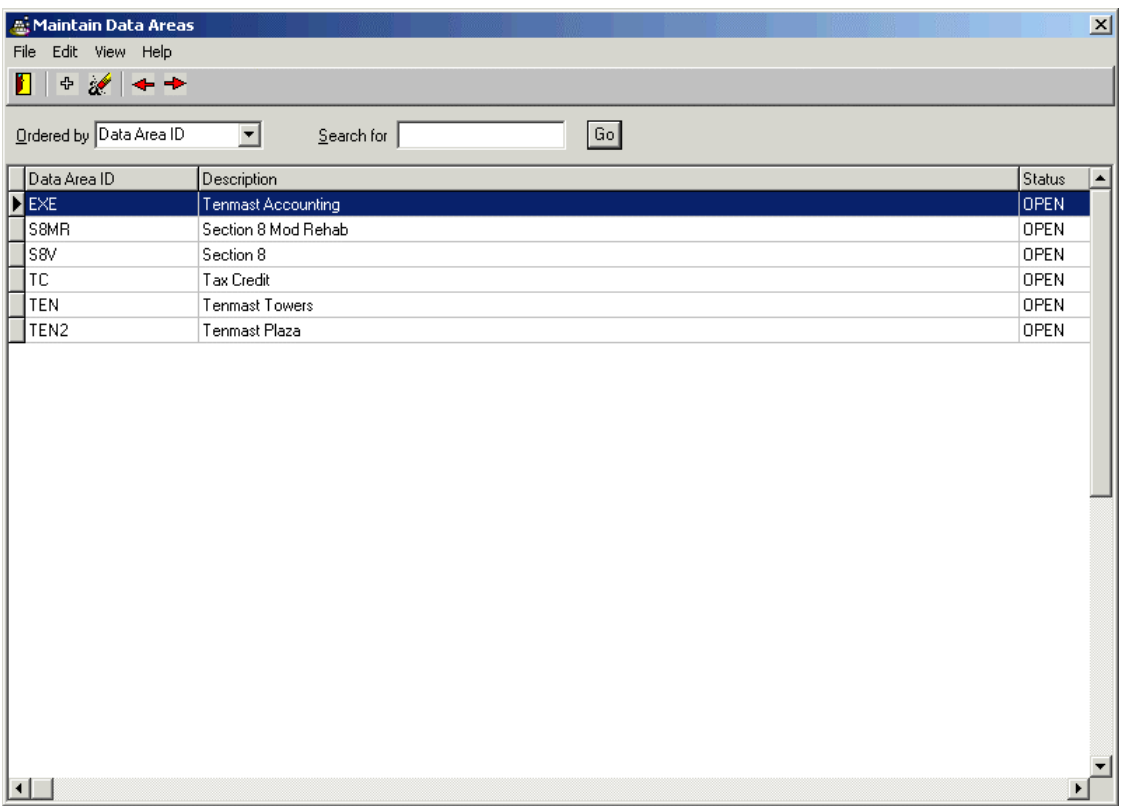
You can use the Browse Data Areas Screen to view and find your agency's data area records.

You can use the Maintain Data Areas Screen to maintain your data area records and to view their detailed information.

To Open the Browse Data Areas Screen:

✓ Press D or click the Data Areas button on the Main Menu.

Browse Data Areas Screen



The Browse Data Areas screen contains a table of your agency's data areas. Each data area contains three non-editable fields: **Data Area ID**, **Description**, and **Status**.

> **Hint:**
> *For related, general help on using a browse screen, see* Manage Records with Browse, Maintain, and Select Screens.

This screen also gives you access to the Maintain Data Areas screen, which lists the programs installed in each data area. (For information on using this screen, see *Edit Data Areas*.)

Data Area ID and Description

You can identify each data area by its ID and text description.

Status

Tenmast staff sometimes use data area status information when helping you with issues or problems that occur in your WinTen² programs.

To Open the Maintain Data Areas Screen:

✓ Edit a data area (press Ctrl+E or click the Edit icon) on the Browse Data Areas screen.

Add Data Areas

You will use the Add Data Area Wizard to add data area records.

> **Hint:**
> *The process of adding a data area is often easier if you have first added all of the data area's programs in Master Setup (see* Maintain Installed Programs *and* Add Programs*).*
>
> *This is especially true if you are setting up your program and data area records upon initially upgrading to or installing WinTen². In this case, first add all of your program records and then add all of your data area records. Select the appropriate programs within each data area in the Add Data Area Wizard.*
>
> *However, if one or more of the new data area's programs have not yet been added, you can complete the Add Data Area Wizard and add the program(s) afterward. After the data area and all of its programs have been added, you can link them together by editing either the data area record (see* Edit Data Areas*) or the program record(s) (see* Edit Programs*). If you have added in individual data area, editing its record is usually easier.*

To Start the Add Data Area Wizard:

✓ Press Ctrl+A or click the Add icon on the Browse Data Areas screen.

✓ See *Use the Add Data Area* Wizard.

Use the Add Data Area Wizard

The Add Data Area Wizard will guide you through three steps to add a data area:

- *Step 1: Add Data Area*
- *Step 2: Select Programs*
- *Step 3: Confirmation*

We will walk through these steps separately.

To Move to the Next Step:

✓ Press PageDown or click the Start, Next, or Finish button.

To Move to the Previous Step:

✓ Press PageUp or click the Back button.

To Cancel the Wizard at Any Time:

✓ Press Esc or click the Cancel button.

> **Hint:**
> *Until you finish the last step, you can go back and change any information you have entered.*

Step 1: Add Data Area

This step allows you to enter identifying information for the data area.

Step 1 contains two data fields: **Data Area Code** and **Description**. Both are required.

Data Area Code

Enter a unique code to identify the data area. The code can contain numbers and/or letters and can be up to eight characters long.

Description

Enter a short text description or “full name” of the data area.

To Complete Step 1:

✓ Tab or click through the fields, entering the data area code and description. (Both are required.)

✓ Press PageDown or click the Start button to go to the next step of the Add Data Area Wizard (*Step 2: Select Programs*).

Step 2: Select Programs

This step allows you to identify the programs that are installed in this data area.

Step 2 contains one field, **Available Programs**. It is required.

Available Programs

This field provides a list of all WinTen²’ programs that are currently listed in Master Setup as installed. Check all programs to be installed in the new data area.

To Complete Step 2:

✓ Click the checkboxes in the Available Programs field to check all programs to be installed in the new data area. (Required.)

✓ Press PageDown or click the Next button to go to the next step of the Add Data Area Wizard (*Step 3: Confirmation*).

Step 3: Confirmation

Step 3 allows you to confirm all of the information before you finish adding this data area. The fields on this screen are not editable.

To Complete Step 3:

✓ If anything is incorrect, press PageUp or click the Back button to go to the previous step(s) and correct it.

- ✓ If everything is correct, press PageDown or click the Finish button to finish adding this data area.

After you finish, you can choose to edit the data area record (see *Edit Data Areas*) or add another new data area.

To Add Another New Data Area:

- ✓ Press Ctrl+A or click the Add icon to restart the Add Data Area Wizard.
- ✓ See *Use the Add Data Area* Wizard.

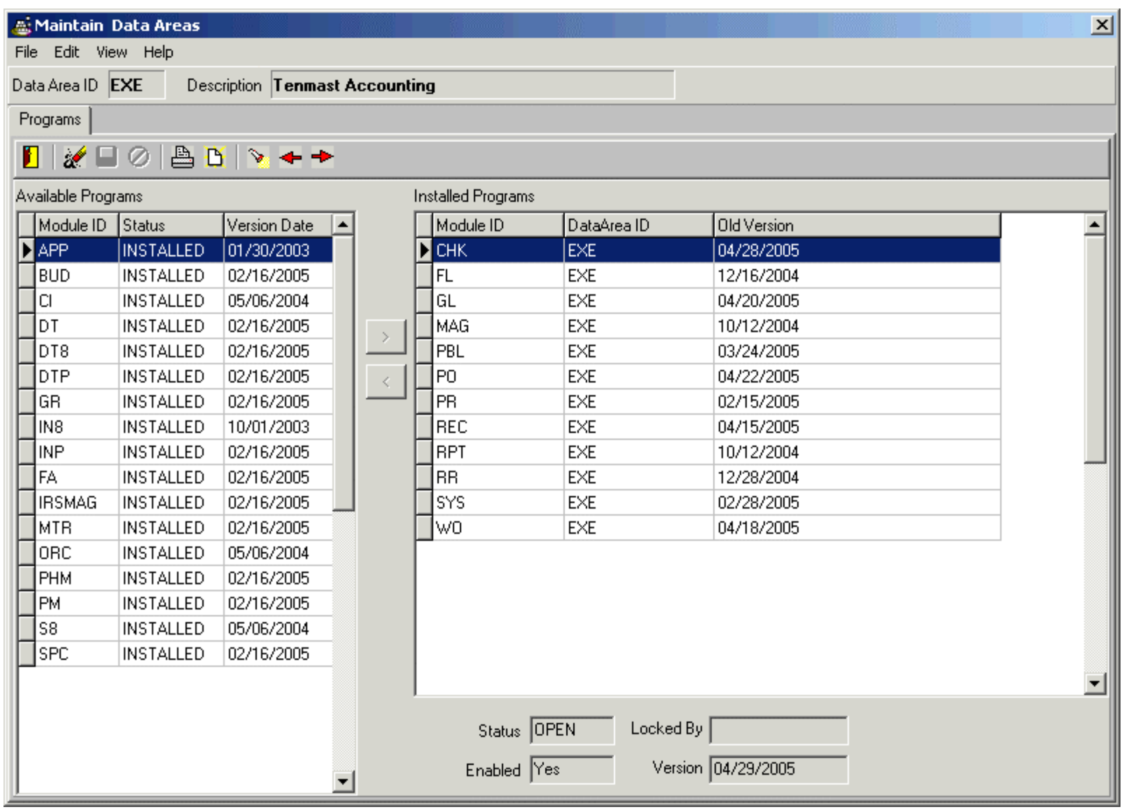
Edit Data Areas

You can use the Maintain Data Areas Screen to view the programs installed in each of your data areas. You may occasionally, although rarely, need to edit this information.

To Open the Maintain Data Areas Screen:

- ✓ Edit a data area (press Ctrl+E or click the Edit icon) on the Browse Data Areas screen. (See *Manage Records with Browse, Maintain, and Select Screens.*)

Maintain Data Areas Screen



The Maintain Data Areas screen has two non-editable fields at the top to identify the selected data area.

This screen also contains two tables: **Available Programs** and **Installed Programs**.

The Available Programs table, on the left, displays all programs that have been added to the Master Setup program, but which are not assigned to the selected data area.

The Installed Programs table, on the right, shows all programs that *are* assigned to the selected data area.

To Add a Program:

- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Select a program in the Available Programs table on the left.
- ✓ Press Alt+DownArrow or click the Add Program button to add this program to the data area.
- ✓ If necessary, repeat to add additional programs. The data area's programs appear in the Installed Programs table on the right.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

To Remove a Program:

> **Caution:**
> ***It is* extremely important *that you do* not *remove programs from data areas, expect in direct consultation with Tenmast staff.***

- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Select a program in the Installed Programs table on the right.
- ✓ Press Alt+UpArrow or click the Remove Program button to remove this program from the data area.
- ✓ If necessary, repeat to remove additional programs.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

CHAPTER 6 Maintain Security Roles

Each of your agency's security roles is based on a particular job function. Each role groups together multiple security permissions (or "task privileges"), so that you can grant them to a user – or revoke them from a user – simultaneously. Master Setup contains one record for each role. (For more information, please see *Plan Security Roles* and the *Tasks, Task Groups, and Security Roles* appendix to this manual.)

Topics addressed in this chapter include:

- *Add Roles*
- *Edit Roles*

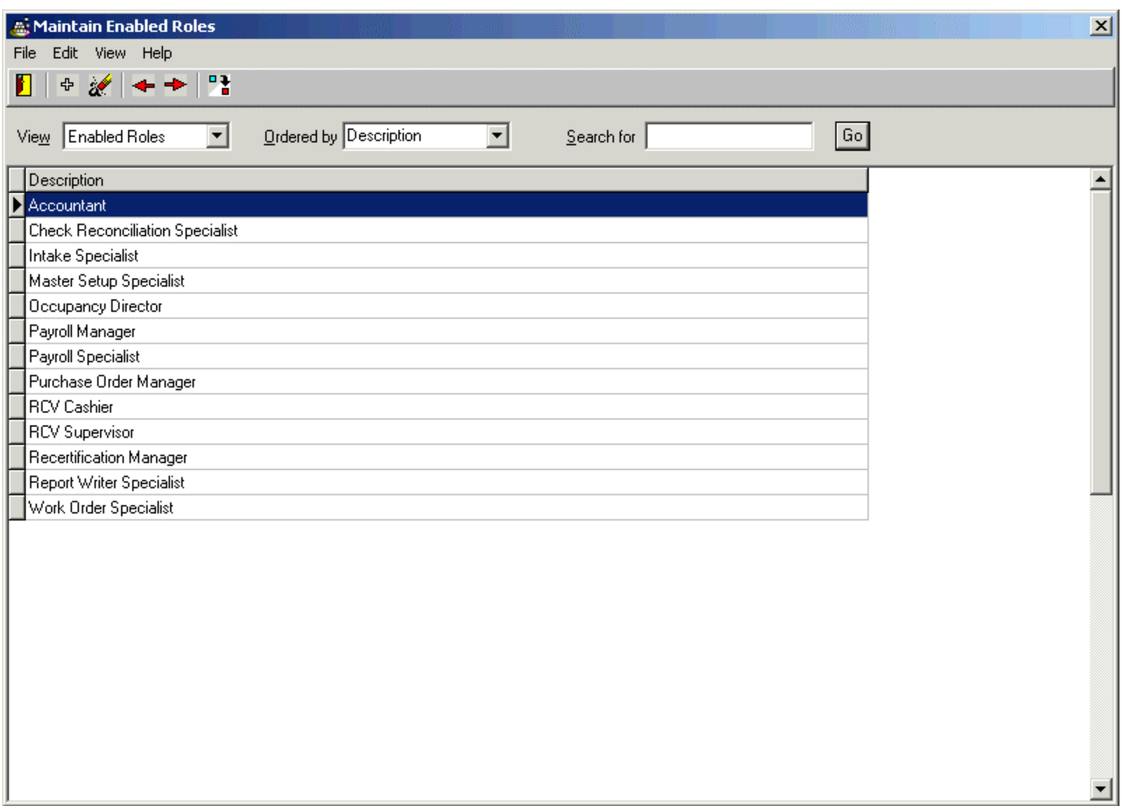
You can use the Browse Roles Screen to view and find your agency's security roles.

You can use the Maintain Roles Screen to maintain your security roles and to view their detailed information.

To Open the Browse Roles Screen:

✓ Press R or click the Roles button on the Main Menu.

Browse Roles Screen



The Browse Roles screen contains a list of your security roles. All currently enabled roles appear by default.

> *For related, general help on using a browse screen, see* Manage Records with Browse, Maintain, and Select Screens*.*

This screen contains the **Change ID** function. (See *Change Role Description*.) It also gives you access to the Maintain Roles screen, which includes additional information. (For information on using this screen, see *Edit Roles*.)

To Open the Maintain Roles Screen:

✓ Edit a role (press Ctrl+E or click the Edit icon) on the Browse Roles screen.

Add Roles

You will use the Add Role Wizard to add user roles.

To Start the Add Role Wizard:

✓ Press Ctrl+A or click the Add icon on the Browse Roles screen.

✓ See *Use the Add Role Wizard*.

Use the Add Role Wizard

The Add Role Wizard will guide you through two steps to add a role:

- *Step 1: Enter Role Description*
- *Step 2: Confirmation*

We will walk through these steps separately.

To Move to the Next Step:

✓ Press PageDown or click the Start or Finish button.

To Move to the Previous Step:

✓ Press PageUp or click the Back button.

To Cancel the Wizard at Any Time:

✓ Press Esc or click the Cancel button.

> **Hint:**
> *Until you finish the last step, you can go back and change any information you have entered.*

Step 1: Enter Role Description

This step allows you to enter a descriptive name for the role.

Step 1 contains one data field, **Role Description**. It is required.

Role Description

Enter a short descriptive name to identify the role.

To Complete Step 1:

- ✓ Enter the role description (required).
- ✓ Press PageDown or click the Start button to go to the next step of the Add Role Wizard (*Step 2: Confirmation*).

Step 2: Confirmation

Step 2 allows you to confirm the description before you finish adding this role. The field on this screen is not editable.

To Complete Step 2:

- ✓ If anything is incorrect, press PageUp or click the Back button to go to the previous step and correct it.
- ✓ If everything is correct, press PageDown or click the Finish button to finish adding this role.

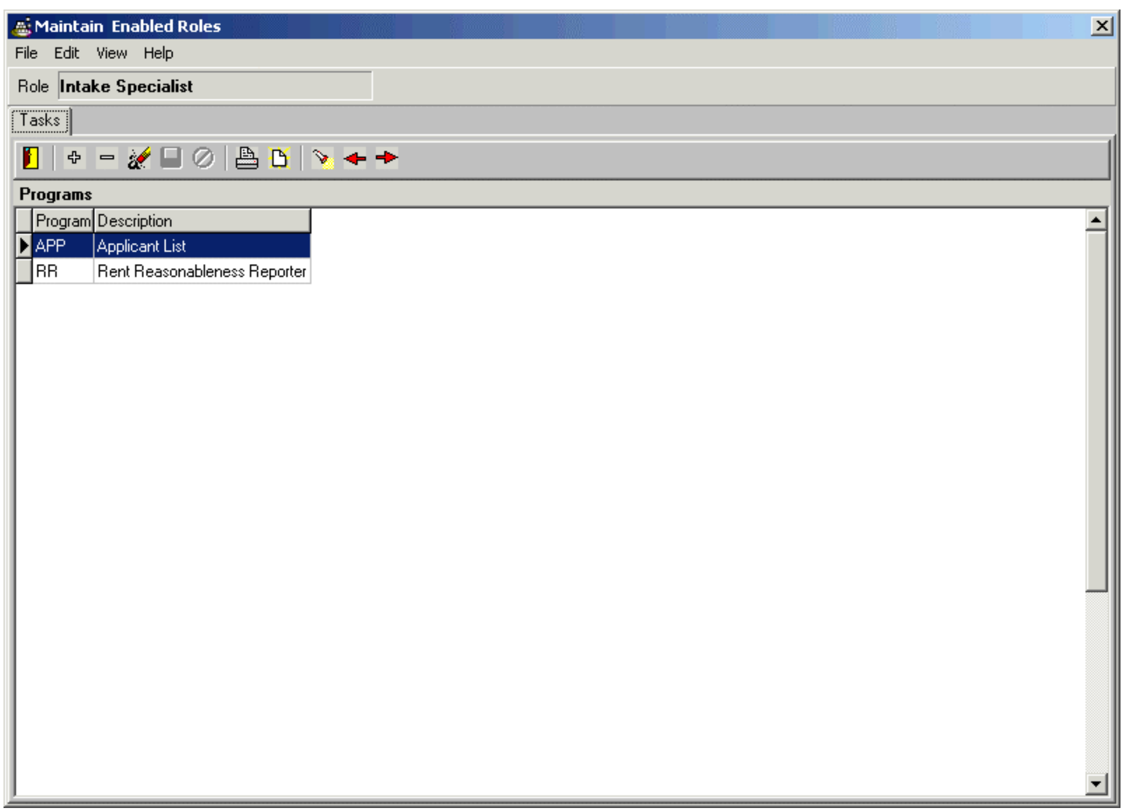
Edit Roles

You can use the Maintain Roles Screen to maintain a list of allowed programs for any role and to access a list of allowed tasks within an allowed program.

To Open the Maintain Roles Screen:

- ✓ Edit a role (press Ctrl+E or click the Edit icon) on the Browse Roles screen. (See *Manage Records with Browse, Maintain, and Select Screens.*)

Maintain Roles Screen



The Maintain Roles screen contains the non-editable **Role** field at the top to identify the selected role.

This screen also contains a list of allowed programs for the selected role. You can identify each program by the non-editable **Program** and **Description** fields.

This screen allows you to add or delete allowed programs. (See *Maintain Allowed Programs*.)

The Maintain Roles screen also gives you access to the Maintain Tasks screen, which you can use to select a role's allowed tasks within any program. (See *Maintain Allowed Tasks per Program*.)

You may occasionally wish to change the description you use to identify a security role. (This function is available from the Browse Roles screen. See *Change Role Description*, below.)

Change Role Description

You may occasionally wish to change the description you use to identify a security role. Doing so will change the name of the role everywhere it appears in Master Setup. It will not change any allowed programs or tasks for the role.

You can change a role's description from the Browse Roles screen.

To Open the Browse Roles Screen from the Maintain Roles Screen:

- ✓ Press Ctrl+H or click the Search icon on the Maintain Roles screen.

To Open the Browse Roles Screen from the Main Menu:

- ✓ Press R or click the Roles button on the Main Menu.

To Change a Role Description:

- ✓ Select, on the Browse Roles screen, the role whose description you wish to change.
- ✓ Press Ctrl+C or click the Change ID icon.
- ✓ The Add Role Wizard opens on Step 1.

  Hint:
  For information on this wizard, see Use the Add Role Wizard*, above.*

- ✓ Edit the description as needed.
- ✓ Press PageDown or click the Start button.
- ✓ Confirm the new description on Step 2.
- ✓ Press PageDown or click the Finish button to save the new description.
- ✓ (To cancel, press Esc or click the Cancel button.)

Maintain Allowed Programs

You can add or delete allowed programs for any role on the Maintain Roles screen.

To enable an allowed program for a role, you must add the program itself *and* select the allowed tasks within the program. (Adding the program alone is not enough to give the security role permission to use the program.)

Deleting a program from a role will remove all access to the program, including all tasks that were previously allowed.

To Add an Allowed Program:

- ✓ Open, on the Maintain Roles screen, the security role you wish to edit.
- ✓ Press Ctrl+A or click the Add icon.
- ✓ The Select Module dialog box opens.
- ✓ Select the program you wish to add.
- ✓ Press Enter or click the OK button to add the program.
- ✓ (To cancel, press Esc or click the Cancel button.)
- ✓ If you added a program, it now opens on the Maintain Tasks screen.
- ✓ Enable the tasks you want this role to perform within the added program. (For information and instructions, see *Maintain Allowed Tasks per Program*, below.)
- ✓ To save the program and tasks, press Ctrl+S or click the Save icon.
- ✓ (To cancel both the program and the tasks, press Ctrl+Q or click the Cancel icon.)

To Delete an Allowed Program:

- ✓ Open, on the Maintain Roles screen, the security role you wish to edit.
- ✓ Select the program you wish to delete on the Maintain Roles screen.
- ✓ Press Ctrl+D or click the Delete icon.
- ✓ Press Y or click the Yes button to confirm the deletion.

Maintain Allowed Tasks per Program

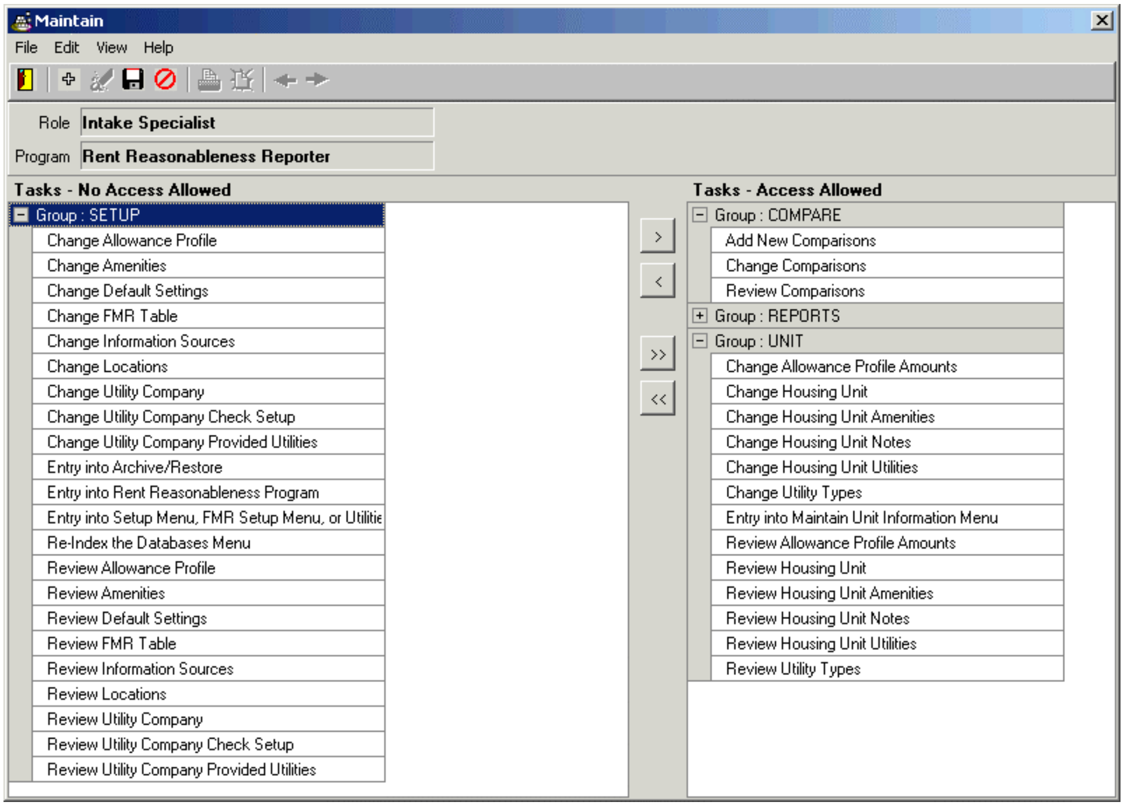
For any program allowed for a security role, you can use the Maintain Tasks Screen to maintain a list of allowed tasks within the program.

To Open the Maintain Tasks Screen:

- ✓ Edit a program (press Ctrl+E or click the Edit icon) on the Maintain Roles screen. (See *Manage Records with Browse, Maintain, and Select Screens*.)

> **Hint:**
> *This screen also opens automatically immediately after you add a program to a role.*

Maintain Tasks Screen



The Maintain Tasks screen contains the non-editable **Role** and **Program** fields at the top to identify the selected role and the selected program within that role.

This screen also contains two tables, one on the left and one on the right.

The left table, **Tasks – No Access Allowed**, displays all of this program's tasks that are currently *not* allowed for the selected security role.

The right table, **Tasks –Access Allowed**, displays all of this program's tasks that currently *are* allowed for the selected security role.

Tasks are organized into groups. Each group has either a plus sign (+) or a minus sign (-) in front of it. Click a group's plus sign to expand it and see the individual tasks within the group. Click a group's minus sign to collapse it and hide the individual tasks.

> **Hint:**
> *For information on tasks and task groups, please see the* Tasks, Task Groups, and Security Roles *appendix to this manual.*

You can add or remove program tasks individually, in groups, or a combination of both. Choose whatever options are most convenient at the time. For example, if you want to allow most (but not all) tasks within a group, you can add the whole group and then remove a few individual tasks that you do not want this role to perform.

To add or remove an entire group, select the "Group" header itself. To add or remove an individual task, expand the group and select the individual task.

To Add Allowed Tasks:

- ✓ Open, on the Maintain Tasks screen, the role and program you wish to edit.
- ✓ If necessary, enter Edit mode by pressing Ctrl+E or clicking the Edit icon. (This is not necessary if this screen opened automatically immediately after you added a program.)
- ✓ Select either a task or task group in the left table.
- ✓ Press Alt+DownArrow or click the Add Task button to add this task or group.
- ✓ Repeat as needed for other tasks and/or groups. The allowed tasks appear in the table on the right of the screen.

  Hint:
  To add all tasks within all groups, press Alt+RightArrow or click the Add All Tasks button.

- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

To Remove Allowed Tasks:

- ✓ Open, on the Maintain Tasks screen, the role and program you wish to edit.
- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Select either a task or task group in the right table.
- ✓ Press Alt+UpArrow or click the Remove Task button to remove this task or group.
- ✓ Repeat as needed for other tasks and/or groups.

  Hint:
  To remove all tasks within all groups, press Alt+LeftArrow or click the Remove All Tasks button.

- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

CHAPTER 7

Maintain Users

Master Setup contains one user record for each agency employee who uses a WinTen² program. Each user's record contains the user name and password the person uses to log into any program.

For each user, you also maintain a list of the data areas to which the user has access. For each of the user's allowed data areas, you maintain a list of the security roles the user has in that data area.

> **Hint:**
> *For information on data areas and security roles, see* Plan Data Areas*,* Plan Security Roles*, and the* Tasks, Task Groups, and Security Roles *appendix to this manual.*

As employees join or leave your agency, or as employees change job functions, you will edit your user records as needed to keep them up to date. This will typically involve adding new user records for new employees, disabling user accounts of former employees, and/or changing users' security roles. You may also need to update or reset passwords from time to time.

> **Note:**
> ***Within Master Setup, "user," "user record," and "user account" all mean the same thing. This manual uses these terms interchangeably.***

You cannot delete a user account once you have created it. Instead, you can disable an account so it can no longer be used.

Topics addressed in this chapter include:

- *Add Users*
- *Edit Users*

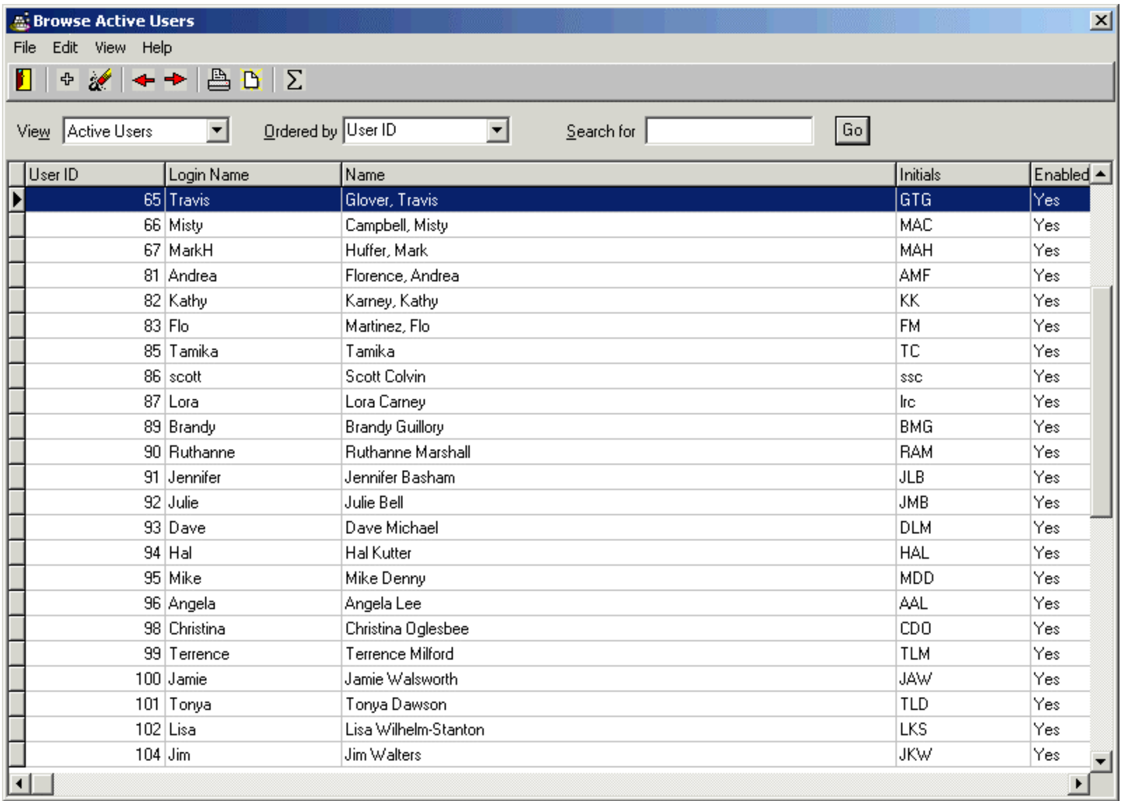
You can use the Browse Users Screen to view and find your agency's user records.

You can use the Maintain Users Screen to maintain your user records and to view their detailed information.

To Open the Browse Users Screen:

✓ Press U or click the Users button on the Main Menu.

Browse Users Screen



User ID	Login Name	Name	Initials	Enabled
65	Travis	Glover, Travis	GTG	Yes
66	Misty	Campbell, Misty	MAC	Yes
67	MarkH	Huffer, Mark	MAH	Yes
81	Andrea	Florence, Andrea	AMF	Yes
82	Kathy	Karney, Kathy	KK	Yes
83	Flo	Martinez, Flo	FM	Yes
85	Tamika	Tamika	TC	Yes
86	scott	Scott Colvin	ssc	Yes
87	Lora	Lora Carney	lrc	Yes
89	Brandy	Brandy Guillory	BMG	Yes
90	Ruthanne	Ruthanne Marshall	RAM	Yes
91	Jennifer	Jennifer Basham	JLB	Yes
92	Julie	Julie Bell	JMB	Yes
93	Dave	Dave Michael	DLM	Yes
94	Hal	Hal Kutter	HAL	Yes
95	Mike	Mike Denny	MDD	Yes
96	Angela	Angela Lee	AAL	Yes
98	Christina	Christina Oglesbee	CDO	Yes
99	Terrence	Terrence Milford	TLM	Yes
100	Jamie	Jamie Walsworth	JAW	Yes
101	Tonya	Tonya Dawson	TLD	Yes
102	Lisa	Lisa Wilhelm-Stanton	LKS	Yes
104	Jim	Jim Walters	JKW	Yes

The Browse Users screen contains a table of user records. All active user accounts appear by default.

> **Hint:**
> *For related, general help on using a browse screen, see* Manage Records with Browse, Maintain, and Select Screens.

This screen contains the **Change User Status** function, which allows you to enable or disable user accounts. (See *Disable or Enable User Accounts*.) The browse screen also gives you access to the Maintain Users screen, which includes additional information. (For information on using this screen, see *Edit Users*.)

To Open the Maintain Users Screen:

✓ Edit a user (press Ctrl+E or click the Edit icon) on the Browse Users screen.

Add Users

You will use the Add User Wizard to add user records.

> **Note:**
> ***The Add User Wizard includes only basic user information. You must set up the user's allowed data areas and roles by editing the user account after you create it. (See* Edit Users *and* Maintain Allowed Data Areas and Roles.*)***

To Start the Add User Wizard:

✓ Press Ctrl+A or click the Add icon on the Browse Users screen.

✓ See *Use the Add User Wizard*.

Use the Add User Wizard

The Add User Wizard will guide you through two steps to add a user:

- *Step 1: Enter User Information*
- *Step 2: Confirm User Information*

We will walk through these steps separately.

To Move to the Next Step:

✓ Press PageDown or click the Start or Finish button.

To Move to the Previous Step:

✓ Press PageUp or click the Back button.

To Cancel the Wizard at Any Time:

✓ Press Esc or click the Cancel button.

> **Hint:**
> *Until you finish the last step, you can go back and change any information you have entered.*

Step 1: Enter User Information

This step allows you to enter all the information needed to add a user.

Step 1 contains five data fields: **Name**, **Initials**, **Login**, **Password**, and **Confirm Password**. All are required, except Initials.

Name

Enter the user's full name. Most agencies enter names in the format "Jane Doe" or "Doe, Jane."

Initials

This field allows you to enter this user's two- or three-character initials. Users' initials appear on various screens and reports throughout the WinTen² system.

Login

Enter a unique user name that this person will use to log into any WinTen² program.

> **Caution:**
> ***This login name must be unique among all of your users. Do* not *enter a login name that someone is already using. If you enter an existing login name, the wizard will replace that existing user account.***

Password and Confirm Password

Enter the user's password in both of these fields. You must enter it exactly the same in both. Asterisks hide the password as an added security feature.

To Complete Step 1:

- ✓ Tab or click through the fields, entering the user information.
  (All fields except Initials are required.)
- ✓ Press PageDown or click the Start button to go to the next step of the Add User Wizard (*Step 2: Confirm User Information*).

Step 2: Confirm User Information

Step 2 allows you to confirm the name, initials, and login before you finish adding the user. The fields on this screen are not editable.

To Complete Step 2:

- ✓ If anything is incorrect, press PageUp or click the Back button to go to the previous step and correct it.
- ✓ If everything is correct, press PageDown or click the Finish button to finish adding this user.

As noted above, the Add User Wizard includes only basic user information. You must set up the user's allowed data areas and roles by editing the user account after you create it. For help on doing this, see *Edit Users* and *Maintain Allowed Data Areas and Roles*.

You can also choose to add another new user record.

To Add Another New User:

- ✓ Press Ctrl+A or click the Add icon to restart the Add User Wizard.
- ✓ See *Use the Add User Wizard*.

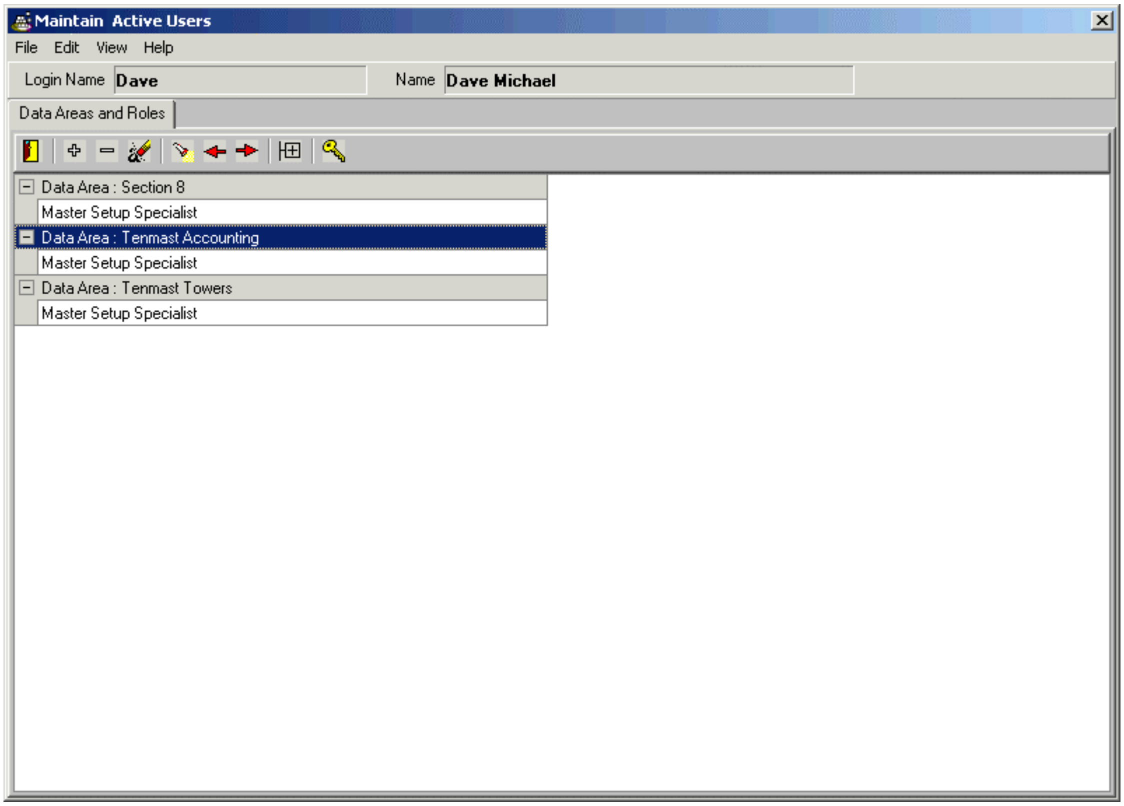
Edit Users

You can use the Maintain Users Screen to maintain user passwords and to maintain the allowed data areas and roles for your users. You may occasionally wish to disable or enable user accounts.

To Open the Maintain Users Screen:

- ✓ Edit a user (press Ctrl+E or click the Edit icon) on the Browse Users screen. (See *Manage Records with Browse, Maintain, and Select Screens*.)

Maintain Users Screen

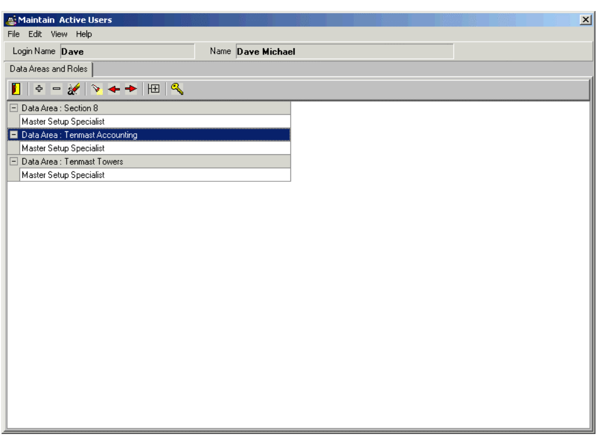


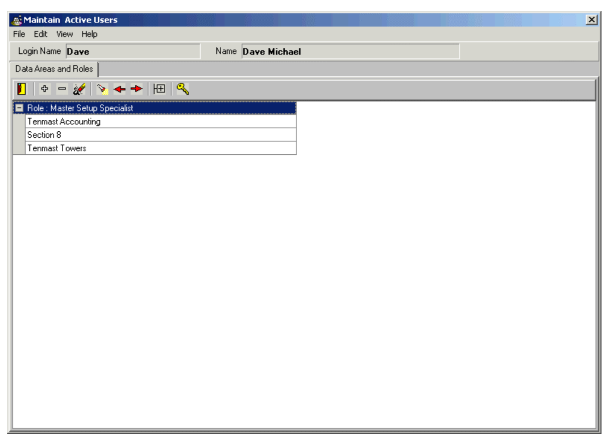
The Maintain Users screen contains two non-editable fields at the top to identify the selected user. **Login Name** displays the user name this person uses to log into WinTen² programs. The **Name** field shows the person's full name.

This screen also contains a table of the selected user's allowed data areas and security roles. Data areas and roles appear in a "tree" view. The view shows either:

1) "Data Area" headers, each listing the allowed roles within that data area, or

2) "Role" headers, each listing the data areas for which the role is enabled.





You can switch back and forth between these two options by clicking the Change View icon (the next to the last icon on the toolbar). Choose whichever option is more convenient at the time.

Each group header ("Data Area: … " or "Role: … ") has either a plus sign (+) or a minus sign (-) in front of it. Click a group's plus sign to expand it and see the individual listings within the group. Click a group's minus sign to collapse it and hide the individual listings.

You are three primary things you can do to change a user account. From the Maintain Users screen, you can change a user's password and maintain a user's allowed data areas and roles. From the Browse Users screen, you can disable or enable a user account. We discuss these actions below, in the following order:

- *Disable or Enable User Accounts*
- *Change Passwords*
- *Maintain Allowed Data Areas and Roles*

Disable or Enable User Accounts

When someone leaves your agency's employment, you should disable the former employee's user account so that person no longer has access to your programs. Failure to do so could pose a potentially serious security threat. (You cannot delete a user account. You can disable it instead.)

Disabling a user's account will deny that user access to all WinTen² programs.

You may occasionally, although very rarely, wish to "re-enable" a user account that you have previously disabled. Doing so will give the user, by default, the same security permissions (as well as the same user name and password) that the user had when the account was disabled.

> **Note:**
> ***After you enable a user account, we recommend that you verify the user's allowed data areas and roles and edit them as needed. Since passwords are not visible in Master Setup, we recommend that you change the password for the user account.***

You can disable and enable user accounts from the Browse Users screen.

To Open the Browse Users Screen from the Maintain Users Screen:

✓ Press Ctrl+H or click the Search icon on the Maintain Users screen.

To Open the Browse Users Screen from the Main Menu:

✓ Press U or click the Users button on the Main Menu.

To Disable a User Account:

✓ Verify that the View field on the Browse Users screen is set to "Active Users."

✓ Select the user account you wish to disable.

✓ Press Ctrl+C or click the Change User Status icon.

✓ A confirmation dialog opens.

✓ To disable this user account, press Enter, press Y, or click the Yes button.

✓ (To cancel, press N or click the No button.)

To Enable a User Account:

- ✓ Set the View field on the Browse Users screen to “Inactive Users.” This lists all disabled user accounts.
- ✓ Select the user account you wish to enable.
- ✓ Press Ctrl+C or click the Change User Status icon.
- ✓ A confirmation dialog opens.
- ✓ To enable this user account, press Enter, press Y, or click the Yes button.
- ✓ (To cancel, press N or click the No button.)

Change Passwords

You can change a user’s password from the Maintain Users screen.

> **Note:**
> ***You cannot change the login name (user name) on a user account. If you wish to change it, you must disable the existing user account and create a new account for the user.***

To Change a User’s Password:

- ✓ Open, on the Maintain Users screen, the user whose password you wish to change.
- ✓ Click the Change Password icon.
- ✓ The Change Password dialog box opens.
- ✓ Enter the new password in the New Password field and in the Confirm New Password field. You must enter it exactly the same in both. Asterisks hide the password as an added security feature.
- ✓ To save the password, click the Save New Password button.
- ✓ (To cancel, click the Close button (X).)

Maintain Allowed Data Areas and Roles

The Maintain Users screen allows you to identify the data areas that a user has access to and the user’s assigned roles within each data area.

You must set up these permissions after you create a new user account. You may also have to edit this information if a user’s position or job functions change or if you make changes to your agency’s business processes.

Topics addressed in this section include:

- *Add Allowed Data Areas and Roles*
- *Edit Allowed Roles*
- *Delete Allowed Data Areas and Roles*

Add Allowed Data Areas and Roles

You will use the Add Data Area / Role Wizard to give a user access to a data area and to assign the user one or more security roles within that data area.

To Start the Add Data Area / Role Wizard:

✓ Press Ctrl+A or click the Add icon on the Maintain Users screen.

✓ See *Use the Add Data Area / Role Wizard*.

Use the Add Data Area / Role Wizard

The Add Data Area / Role Wizard will guide you through three steps to give a user access to a data area. You will also assign the user one or more security roles within that data area.

- *Step 1: Select Data Area*
- *Step 2: Assign Roles*
- *Step 3: Confirmation*

We will walk through these steps separately.

To Move to the Next Step:

✓ Press PageDown or click the Start, Next, or Finish button.

To Move to the Previous Step:

✓ Press PageUp or click the Back button.

To Cancel the Wizard at Any Time:

✓ Press Esc or click the Cancel button.

> **Hint:**
> *Until you finish the last step, you can go back and change any information you have entered.*

Step 1: Select Data Area

This step allows you to choose a data area to add for the selected user.

Step 1 contains the non-editable **User** field at the top to identify the selected user.

This step also contains a list of all of your agency's data areas. If this user already has at least some access to a data area, that data area appears in bold, blue text. Data areas in normal text are those to which this user currently has *no* access.

> **Note:**
> ***You can choose a data area to which the user already has access (bold, blue text), if you wish to assign additional roles within that data area.***

To Complete Step 1:

✓ Click to select the data area to which you wish to give this user access (or additional roles).

✓ Press PageDown or click the Start button to go to the next step of the Add Data Area / Role Wizard (*Step 2: Assign Roles*).

Step 2: Assign Roles

This step allows you to select the security roles to add for this user within the selected data area.

Step 2 contains non-editable fields at the top to identify the selected user and data area.

This step also contains the **Assigned Roles** and **Roles Not Enabled** fields and the **Mark All** and **Unmark All** functions.

Assigned Roles

This non-editable field displays the roles, if any, that this user already has within this data area.

> **Note:**
> ***This wizard does not allow you to remove these roles. If you wish to remove roles, you must edit the user account from the Maintain Users screen. See* Edit Allowed Roles*, below.***

Roles Not Enabled

This field displays all of the security roles that this user currently does *not* have within this data area. Check the roles you wish to add for this user within this data area.

Mark All and Unmark All

Use these timesaving functions to check or uncheck all roles, respectively.

> **Hint:**
> *If you wish to check all or most roles, for example, use the Mark All function and then manually uncheck roles as needed.*

To Complete Step 2:

- ✓ Press Alt+M or click the Mark All button to check all roles (optional).
- ✓ Verify the roles you just selected.
  OR
  Click the checkboxes in the **Roles Not Enabled** field as needed to check or uncheck roles. (Required.)
- ✓ Press PageDown or click the Next button to go to the next step of the Add Data Area / Role Wizard (*Step 3: Confirmation*).

Step 3: Confirmation

Step 3 allows you to confirm the information before you finish adding the data area and role(s). The fields on this screen are not editable.

To Complete Step 3:

- ✓ If anything is incorrect, press PageUp or click the Back button to go to the previous step(s) and correct it.
- ✓ If everything is correct, press PageDown or click the Finish button to finish adding the data area and role(s).

If necessary, you can restart the wizard to add another data area for this user.

To Add Another Data Area and Role(s):

- ✓ Press Ctrl+A or click the Add icon to restart the Add Data Area / Role Wizard.
- ✓ See *Use the Add Data Area / Role Wizard*.

Edit Allowed Roles

You may occasionally wish to edit the roles a user has within a particular data area.

To Edit Allowed Roles within a Data Area:

- ✓ Open, on the Maintain Users screen, the user whose roles you wish to change.
- ✓ Verify that the group headers in the tree view begin with "Data Area." If necessary, change the view by clicking the Change View icon (the next to the last icon on the toolbar).
- ✓ Click to select the header of the data area whose roles you wish to change for this user.
- ✓ Press Ctrl+E or click the Edit icon.
- ✓ The Edit User Data Area screen opens to display a list of your agency's security roles. If a role is checked, this user currently has that role within the selected data area. If a role is not checked, the user does not have that role within this data area.
- ✓ Click to check or uncheck roles as needed.
- ✓ Verify that you want this user to have each checked role within the selected data area.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

Delete Allowed Data Areas and Roles

If you wish to remove a user's access to an entire data area, you can delete that data area from the user's record. Doing so will remove the user's security permissions to the data area and to all roles within the data area. The user will no longer have access to any information in that data area.

If you wish to remove a *role* that you have assigned to a user within a data area, you can follow the steps outlined above for editing allowed roles. Simply uncheck any roles you wish to remove from the user. (See *Edit Allowed Roles*, above.)

To Remove a User's Access to a Data Area:

- ✓ Open, on the Maintain Users screen, the user whose access you wish to change.
- ✓ Verify that the group headers in the tree view begin with "Data Area." If necessary, change the view by clicking the Change View icon (the next to the last icon on the toolbar).
- ✓ Click to select the header of the data area you wish to remove from this user.
- ✓ Press Ctrl+D or click the Delete icon.
- ✓ Press Y or click the Yes button to confirm the deletion.

CHAPTER 8

Print Documents

You have various options for printing documents in Master Setup.

Topics addressed in this chapter include:

- *Preview a Document*
- *Print a Document*

Preview a Document

You may choose to preview a document before you print it or, even if you are not printing it, you may choose just to view it on-screen.

You will use the Print Preview Screen to preview your printed document.

To Open the Print Preview Screen:

✓ Select the document you wish to view on either a Browse screen or a Maintain screen. (See *Manage Records with Browse, Maintain, and Select Screens*.)

✓ Press Ctrl+W or click the Preview icon.

Print Preview Screen

There are four options on the Preview screen: **Print**, **Zoom**, **Change Page**, and **Close**.

Print

The Print option opens a Print dialog box from which you can print the document. (See *Print a Document*.)

To Print:

✓ Click the Print icon.

Zoom

You have four choices for zooming the preview (making it larger or smaller): the **Whole Page**, **Page Width**, and **100% icons** and the **Percentage Zoom field**.

The Whole Page and Page Width icons size the page to the window. Whole Page, usually the smallest option, lets you see the entire page and Page Width, usually the largest option, widens the page to fill the window horizontally. The 100% icon sets the page to its normal, “full” size, regardless of the window size. The Percentage Zoom field lets you enter any percentage from 25% to 250%.

To Change the Zoom:

✓ Click one of the three zoom icons.
   OR
  Tab or click to the Percentage Zoom field, type a number, and press Enter.

Change Page

The Change Page options let you move from one page of your preview to another. Obviously, they are available only for multiple-page previews. There are five options: the **First Page**, **Prior Page**, **Next Page**, and **Last Page icons** and the **Page Number field**.

Each of the four icons takes you to its respective page. The Page Number field lets you enter the number of the page you want to see.

To Change the Page:

✓ Click one of the four page icons.
   OR
  Tab or click to the Page Number field, type a number, and press Enter.

Close

The Close option closes the preview.

To Close:

✓ Press Esc, press Alt+C, or click the Close button.

Print a Document

You will use the Print Dialog Box to print a document.

To Open the Print Dialog Box:

✓ Select the document you wish to print on either a Browse screen or a Maintain screen. (See *Manage Records with Browse, Maintain, and Select Screens*.)

✓ Press Ctrl+R or click the Print icon.

(Or click the Print icon on the Print Preview screen.)

Print Dialog Box

There are three primary fields on the Print dialog box: **Printer**, **Page Range**, and **Copies**.

To Print

✓ If necessary, tab or click to the Printer Name field and select the Printer.

✓ If necessary, click the appropriate Page Range radio button and/or type a number range in the Pages field.

✓ If necessary, tab or click to the Number of Copies field and type or select a number.

✓ To print, press Enter or click the OK button.

✓ To cancel, press Esc or click the Cancel button.

Part III: Setup

CHAPTER 9

Plan Master Setup Options

The security for your agency's WinTen² programs is made up of data areas, security roles, and user accounts. You should carefully plan your data areas and security roles before using the Master Setup program and the WinTen² system.

Topics addressed in this chapter include:

- *Plan Data Areas*
- *Plan Security Roles*

Plan Data Areas

There are three primary considerations when planning your agency's data areas:

- ***Types of tenants:*** *Your agency will have one data area for each type of tenant for whom your employees have distinct security permissions.*
- ***Accounting data area:*** *Your agency will have one EXE data area for accounting information.*
- ***WinTen data areas:*** *If your agency already has data areas set up under the WinTen system, you may (or may not) choose to keep your existing data areas.*

This section discusses these three considerations.

> **Note:**
> ***Most agencies plan their data areas in close consultation with Tenmast when first upgrading to or installing WinTen². After your data areas are set up, you will rarely need to change them.***

The primary function of data areas in WinTen² is simply to group tenants together based on security considerations. You can use different security permissions for your employees to work with different groups of tenants. Your agency will have one data area for each group of tenants for whom your employees have distinct security permissions.

For example, your agency may have one set of employees who work only with Section 8 tenants and another set of employees who work only with public housing tenants. In this case, you would create one data area for Section 8 and one for public housing. You would then give the appropriate security permissions to each group of employees (users). Your Section 8 employees would have no access to tenant information in the public housing data area, and vice versa.

You would need the same separate data areas if some of your employees worked with both Section 8 and public housing tenants, but had *different permissions* for working with each group.

> **Hint:**
> *If appropriate, you might have any number of additional data areas for different types of tenants, such as one for tenants in a new construction project.*

On the other hand, if the security permissions you gave to any particular employee were the same for accessing all of your tenants, no matter what kinds of tenants they were, you would need only one data area for your tenants.

In addition to the “tenant” data areas mentioned above, you will have one data area (entitled “EXE”) for all of your accounting data. Having this separate data area allows your WinTen² accounting programs to manage financial information across all of your agency’s operations.

Tenmast’s WinTen system, in general, required the use of more data areas than the WinTen² system does. If your agency used WinTen, you may decide that you would prefer to keep the data areas you already have, even though there may be more of them than WinTen² requires. On the other hand, based on the security considerations discussed above, you may decide that you would like to combine some of your existing data areas. This will probably take more short-term planning and effort, but will simplify things for you in the long run. WinTen² allows either decision.

For help on setting up your data area records, see *Maintain Data Areas*.

For help on giving users access to data areas, see *Maintain Users*.

Plan Security Roles

Security roles group together multiple task permissions, so that you can grant them to a user (or revoke them from a user) simultaneously. If a person’s job functions change, you can easily add or remove roles without having to edit the individual tasks the user can perform. If you make minor changes to your business processes, you can edit the roles without having to edit each user account that has a given role. (For information, see the *Tasks, Task Groups, and Security Roles* appendix to this manual.)

> **Note:**
> ***Most agencies plan and set up their security roles in close consultation with Tenmast when first upgrading to or installing WinTen². After these records are set up, you will rarely need to change them.***

Security roles are based on job function. There are two primary considerations when planning your security roles:

- ***The size of your agency***
- ***The job functions performed by your employees***

If all employees with the same position or job title perform the exact same functions, you can set up one role for each employee position. (This is sometimes the case with smaller agencies; it is rarely true of larger ones.) As an example of this option, you might have one security role for each of the following positions:

Administrative Assistant
Executive Director
Maintenance Supervisor
Maintenance Worker
Office Clerk (or Assistant)
Office Manager

Having one role per employee position usually works only for very small agencies. Most agencies will set up roles based on the specific job functions within each position. This gives you much greater flexibility in assigning roles to employees (users), but also requires much more planning.

For most agencies, the first step in planning your security roles is to analyze your operations and identify specific business processes. A business process is a group of related actions (a set of steps or a chain of events) that changes information and/or creates some product or service. Examples of business processes might be entering a tenant application, moving-in a tenant, conducting a certification, creating bills, taking a payment, creating a work order, performing a vacancy fix-up on a unit, or taking inventory.

Next, group related business processes into “job functions” or “job duties.” Each job function you identify becomes one security role. This step is very subjective. You have great flexibility in choosing how to define your roles. You may wish to define many, very specific roles. (This is more often the case with larger agencies.) On the other hand, you may wish to define fewer, more general ones. (This is more common for smaller agencies.)

For example, you may have one role (say, “Housing Specialist”) for all housing-related business processes, such as taking applications, moving-in tenants, and conducting certifications. Alternatively, you could choose to separate these into two or more roles. You might have an “Intake Specialist” role for taking applications and moving-in tenants, and a “Certification Specialist” role for conducting certifications.

As you make these decisions, keep in mind your agency’s security considerations. The tighter you want your security to be, the more roles you will define. If you want your security to be more restrictive, you will define a larger number of very specific roles, each containing few business processes. If you want your security to be less restrictive, you will define fewer roles that are more general, each containing more business processes.

Remember to plan roles for your managerial staff. Roles for managers usually include higher-level business processes, as well as authority to control various Setup options in WinTen² programs.

You have one other option in regard to roles for managers: Do you wish to include only those business processes that are specific to the manager, or do you also wish to include all the business processes performed by the manager’s subordinates? The purpose of this decision is to ensure that each manager can perform all the tasks done within his or her department. The result is the same, but the two options work differently in practice.

If you choose the first option (only business processes specific to the manager), you will assign each manager both the management role *and* the subordinate role(s). If you choose the second option (both management and subordinate business processes), you can assign each manager only the appropriate management role.

For most agencies, all of these steps lead to sets of "specialist" roles (for employees or subordinates) and sets of "manager" roles (for supervisors or administrators). The following are some common examples you might consider:

Accountant
Accounting Manager
Caseworker
Certification Manager
Certification Specialist
Inspection Manager
Inspector
Intake Manager
Intake Specialist
Inventory Manager
Inventory Specialist
Maintenance Supervisor
Maintenance Worker
Occupancy Manager
Occupancy Specialist
Payment Clerk
Payroll Manager
Payroll Specialist
WinTen² Administrator

For each of your roles, you will define each WinTen² program the role has rights to use. For each program within the role, you will define the specific tasks the role can perform in that program.

Make these decisions based on the business processes each role has to perform. What tasks do users have to perform in order to do their jobs? Which WinTen² programs contain those tasks? Repeat this process to define the rights of each role.

An "Intake Manager" role, for example, might have access to the Applicant List and Rent Reasonableness programs. Within both programs, this managerial role might have rights to perform all tasks. An "Intake *Specialist*" role might have access to the same two programs, but *not* have access to tasks within the Setup areas of the programs.

> **Hint:**
> *If all of this sounds a little overwhelming, remember that most agencies plan and set up their roles in close consultation with Tenmast when first upgrading to or installing WinTen². After these records are set up, you will usually need to change them only if your business processes change.*

Finally, you will assign roles to users. Some users may have only one or two roles; some users may have several. Each user's roles are specific to data areas. In other words, a user may have one set of roles in one data area and different roles (or no roles at all) in another data area. (See *Plan Data Areas*, above.)

One last note on security roles: You will have one or two roles for administering your WinTen² programs. You may have a "Master Setup Specialist" role that has rights to perform all the tasks in Master Setup, or you may have a "WinTen² Administrator" role that can perform all tasks in all programs, including Master Setup. (You may choose to have both of these roles.)

> **Caution:**
> ***Presumably, you must have one of these "administrator" roles in order to work in the Master Setup program. Please be especially careful when editing these roles or when editing your own user account. If you remove Master Setup tasks from the role – or if you remove the role from your user account – you can remove your own security permissions and lock yourself out of the Master Setup program.***

For help on setting up your security roles, see *Maintain Security Roles*.

For help on assigning roles to users, see *Maintain Users*.

CHAPTER 10

Implement Setup

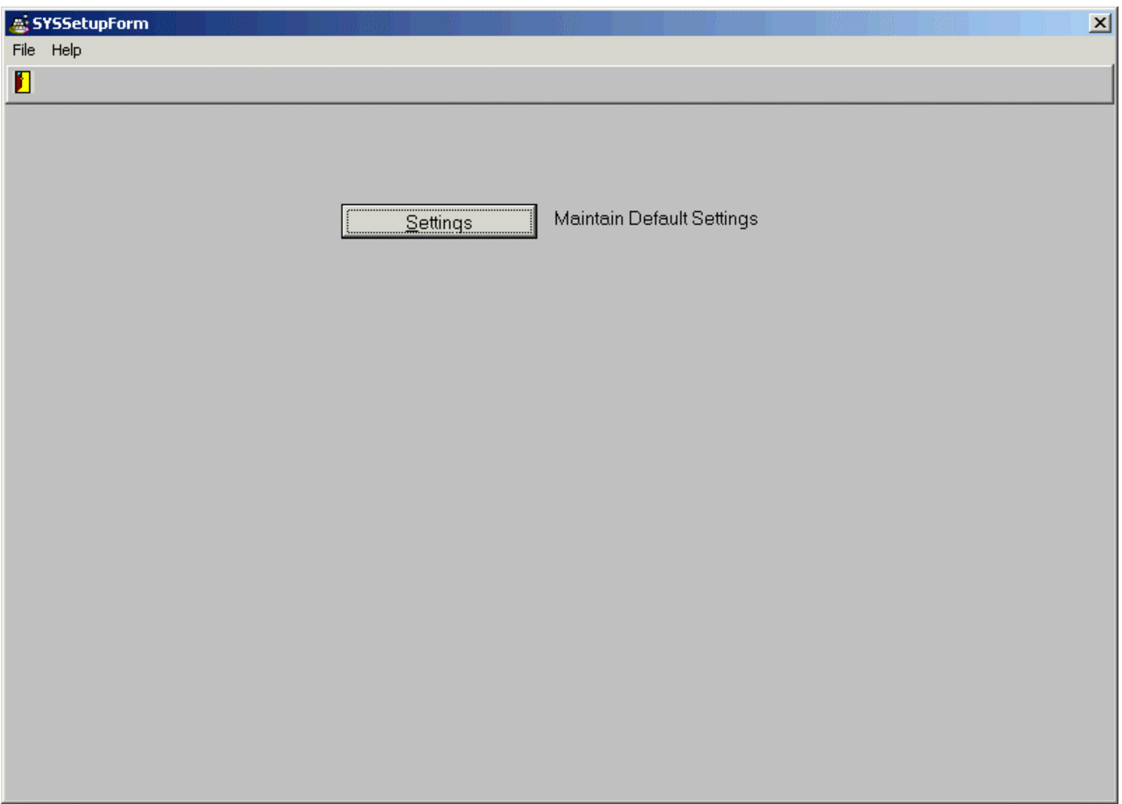
The Setup area of the Master Setup program itself contains the Maintain Default Settings function. This stores your agency's default contact or "return address" information, which is used by all of your WinTen² programs.

You will use the Setup Screen to access this function.

To Open the Setup Screen:

✓ Press S or click the Setup button on the Main Menu.

Setup Screen



The Setup screen gives you access to one Setup area:

- *Maintain Default Settings*

This area has its own screen, which we will walk through below.

Maintain Default Settings

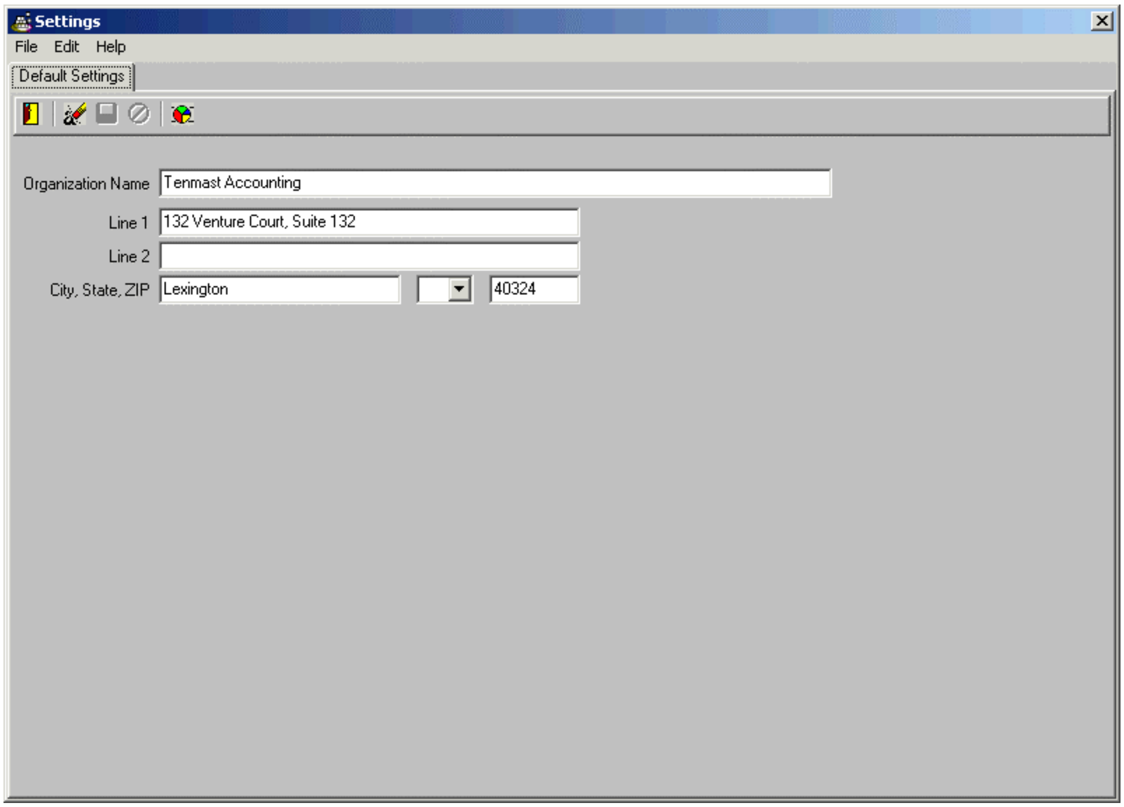
Master Setup Default Settings contains your agency's default contact or "return address" information.

You will use the Settings Screen to enter and maintain this information.

To Open the Settings Screen:

✓ Press S or click the Settings button on the Setup screen.

Settings Screen



The Settings screen gives you access to two different options: **Change Color** and your agency's contact or "return address" information.

To change color, you must *not* be in Edit mode. To change your contact information, you must be in Edit mode.

To Enter Edit Mode:

✓ Press Ctrl+E or click the Edit icon.

To Save Changes and Leave Edit Mode:

✓ Press Ctrl+S or click the Save icon.

To Cancel Changes and Leave Edit Mode:

✓ Press Ctrl+Q or click the Cancel icon.

To Exit this Screen:

- ✓ Press Esc or click the Exit icon.

Change Color

Some agencies choose to color code their WinTen² programs so they know at a glance which program they are using. The Change Color icon allows you to set the background color of screens in Master Setup.

> **Hint:**
> *Light colors work best.*

To Change Background Color:

- ✓ Press Ctrl+L or click the Change Color icon.
- ✓ Click to choose a Basic color.
  OR
  Click the Define Custom Colors button and choose a custom color.
- ✓ Click the OK button.

Contact Information

Enter your agency's contact or "return address" information in the fields provided. What you enter here will appear as your default contact information in all WinTen² programs.

To Maintain Your Contact Information:

- ✓ Press Ctrl+E or click the Edit icon.
- ✓ Tab or click through the fields, entering or editing your contact information as needed.
- ✓ To save your changes, press Ctrl+S or click the Save icon.
- ✓ (To cancel, press Ctrl+Q or click the Cancel icon.)

Part IV: Appendices

APPENDIX A

Tasks, Task Groups, and Security Roles

One of the most important purposes of the Master Setup program is to control your agency's security permissions. These permissions determine what any individual can see or do in any WinTen² program.

Your first step in defining security permissions is to plan and create the data areas and security roles you wish to use. You will then assign roles to individual users within specific data areas.

Each security role is based on a particular job function. Each role groups together multiple security permissions (or "task privileges"), so that you can grant them to a user – or revoke them from a user – simultaneously.

For each role, you will define each WinTen² program the role has rights to use. For each program within the role, you will define the specific tasks the role can perform in that program. To save time, built-in "task groups" allow you to enable multiple, related tasks at once.

This appendix provides a basic introduction to security roles and to the tasks and task groups within them. Because these three elements build upon one another, we will discuss them in the following order:

- *Tasks*
- *Task Groups*
- *Security Roles*

For a more detailed discussion of data areas and security roles and of issues to consider when planning them, please see *Plan Data Areas* and *Plan Security Roles*.

For help on assigning roles to users, see *Maintain Users*.

Tasks

A task is a specific action or function a user can perform within a specific WinTen² program. Each program has its own set of available tasks. (Tasks are not customizable.) There are well over 500 different tasks across the entire suite of WinTen² programs. This allows you to be very precise in assigning allowed tasks to your security roles.

There are many different kinds of tasks. Some tasks allow entry into particular areas of a program. Others allow users to add, edit, or delete specific kinds of records or print specific reports. Some tasks allow users to access individual functions within a program. Almost any action a user can take in a program is represented by a task.

To give you a clearer picture of program tasks, below are just a few examples from the WinTen² Applicant List program. (Applicant List alone has nearly one hundred different tasks.)

Accept Offer	Edit Fair Market Rent / Utility Tables	Make Unit Offer
Add Applicants	Edit Household Members	Recalculate Totals Function
Add Assets	Edit Income Limit Tables	Reject Unit Offer
Add Household Members	Edit Incomes	Remove from Waiting List
Add Income Limit Tables	Edit Waiting List	Reports Menu - Applicant Tab
Add Incomes	Edit Waiting List Actions	Reports Menu - List Management Tab
Delete Applicants to History	Edit Waiting List Setup	Review Applicant History
Delete Assets	Edit Waiting List Statuses	Review Applicants
Delete Fair Market Rent / Utility Tables	Entry into Reports Menu	Review Application Activity
Delete Household Members	Entry into Setup Menu	Review Assets
Delete Income Limit Tables	Entry into Tenmast Applicant List Program	Review Fair Market Rent / Utility Tables
Delete Incomes	Expire Voucher	Review Household Members
Edit Applicant History (All Screens)	Extend Voucher	Review Income
Edit Applicant Main Screen	Issue Voucher	Run Applicant History Report 1
Edit Assets	Make an Applicant Inactive	Run Applicant History Report 2

Task Groups

As you can see, the large number of available tasks allows you to be very specific in defining what a given security role can see or do in any program. Sometimes, however, you may not want to be quite so specific. Instead, you may want to give a security role broad access to many related tasks. Assigning numerous allowed tasks to a role one by one could become very time consuming.

That is where task groups come in. A task group is simply a time saving device. It groups related tasks together so that you can add or remove an entire group of tasks at once – without having to add or remove each one individually.

As with tasks themselves, task groups are pre-defined. You cannot customize them. Task groups are often based on a program's primary functions available from the Main Menu. Most programs, for example, have a "Setup" task group that includes the actions available after you click the Setup button on the Main Menu. Likewise, most programs have a "Reports" task group that corresponds to the Main Menu's Reports function. The Purchase Order program, for instance, also includes the "Blanket PO" and "Vendor" task groups, which correspond to their respective functions on the Main Menu.

Note:
Not all task groups correspond exactly to Main Menu functions. The Applicant List program, for example, combines the Applicants function and the Waiting Lists function from the Main Menu into one "Applicants" task group.

When setting up any given security role, you can choose whether to assign individual tasks, task groups, or some combination of both. Choose whatever options are most convenient at the time. For example, if you want to allow most (but not all) tasks within a group, you can assign the whole group and then remove a few individual tasks that you do not want that security role to perform.

Security Roles

A security role is also a time saving device, like a task group, but it is one step more complex. A security role groups together multiple task permissions, so that you can grant them to a user (or revoke them from a user) simultaneously.

Roles have two components: programs and tasks. For each role, you will define each WinTen² program the role has rights to use. For each program within the role, you will define the specific tasks the role can perform in that program.

Security roles are based on job function. For instance, you might have an "Intake Specialist" role for all of the tasks related to housing new applicants. You might also have an "Occupancy Specialist" role for all the tasks related to serving existing tenants.

The main benefit of basing roles on job functions is that your agency's job functions rarely change. Once you have set up your roles, you will usually have to change them only if you change your procedures (your "business processes").

In contrast, your employees will likely change much more often, either because you hire new employees or because an employee's job functions within your agency change. If you had to edit the individual tasks an employee could perform each time one of these changes occurred, it could become extremely time consuming.

By using security roles, you can easily add or remove roles if a person's job functions change – without having to edit the individual tasks the user can perform. This is also true of adding roles for new employees.

Roles save time, as well, if some of your employees perform identical or overlapping job functions. You can assign a role to multiple employees, instead of having to define the same tasks repeatedly for all of them.

After you set up your roles, you will assign them to users. Some users may have only one or two roles; some users may have several. Each user's roles are specific to data areas. In other words, a user may have one set of roles in one data area and different roles (or no roles at all) in another data area. (For information on data areas, see *Plan Data Areas*.)

For a more detailed discussion of security roles and of issues you might consider when setting up your agency's custom roles, please see *Plan Security Roles*.

For help on assigning roles to users, see *Maintain Users*.

APPENDIX B

Program Changes for Existing Clients

Tenmast clients who have used the WinTen Master Setup program should take special note of the following changes:

- *No Re-Indexing*
- *Banking and Accounting Setup Functions Moved to General Ledger*

No Re-Indexing

The **Re-Index** function, which previously appeared on the Main Menu screen, does not exist in WinTen² Master Setup. It is no longer needed.

Banking and Accounting Setup Functions Moved to General Ledger

The functions for maintaining your **Bank Accounts**, **Account Segments**, **Funds**, and **Due To**/**Due From Accounts** are now in the Setup area of the WinTen² General Ledger program. For information, please see the user manual for WinTen² General Ledger.

In the WinTen Master Setup program, these functions appeared on the Main Menu screen.

APPENDIX C

Keyboard Actions

All WinTen² programs offer expanded options for using the keyboard to speed data entry.

When working in WinTen² programs, many users prefer to point and click with the mouse to execute commands. Those options are available, if you wish to use them. However, as you become more comfortable with your computer in general and with WinTen² programs in particular, you may find it quicker and easier to use “keyboard shortcuts” to execute commands.

Here are a few things to remember when using keyboard shortcuts, followed by a list of some of the more helpful keyboard options.

Pressing and Clicking

When a WinTen² user manual instructs you to “press” a key or keys, it refers to pressing keys on your keyboard. For example, “press Enter” means, “press the Enter key on your keyboard.” “Press Spacebar” means, “press the spacebar key.”

> **Hint:**
> *If the name of an individual key has more than one word in it, the manuals refer to it by capitalizing all the words and removing the spaces between them. The Page Down key, for instance, appears as, “PageDown.” The up arrow key appears as, “UpArrow.”*

When a WinTen² user manual instructs you to “click” a button or icon, it refers to using the mouse to click something on the computer screen. For example, “click the Setup button” means, “use your mouse to click the Setup button on the screen.”

Key Combinations

Most keyboard shortcuts use more than one key at a time. Key combinations are often the Alt (Alternate) or Ctrl (Control) key followed by a letter or number key.

WinTen² user manuals abbreviate key combinations in the format *key+key*. For example, “press Ctrl+C” means, “press and hold Ctrl and then press C.”

Much like the Shift key, the Ctrl and Alt keys modify the way the computer interprets other keys, but will not type anything by themselves. When a key combination includes one of these keys, it will appear first in the combination. You should press and hold the first key before pressing the last key in the combination.

> **Hint:**
> *Think of this as like using Shift to type a capital letter. For example, pressing Shift+A should type a capital letter* A*, but if you press and hold* A *before pressing Shift, you might type something like “aaaaaaaA.” However, if you press and hold Shift first, you will just type “A.” The same holds true for issuing commands with key combinations that include Alt or Ctrl.*

Focus: Using Tab and Enter

When you first enter a screen, “focus” is on a particular button or data field. The program shows focus with a dotted line around the inside of a button or a flashing cursor in a data field.

You can move focus to the next field or option by pressing Tab. This usually moves focus down or to the left. Move focus to the previous field or option (usually up or to the right) by pressing Shift+Tab.

> **Hint:**
> *If you are in a menu, you can also move focus by pressing the arrow keys.*

When a button has focus, you can activate it by pressing Enter, which has the same effect as if you had clicked the button. When a data field has focus, you can type data into it.

On-Screen Hints

There are three types of on-screen hints you can use to help you remember keyboard shortcuts: underlined letters, tool tips, and menu prompts.

The names of many commands and fields have one letter underlined. Whenever you see an underlined letter, you can activate that choice by pressing and holding Alt, and then pressing the underlined letter. If it is for an icon, button, or menu choice, you will execute that command. If it is for a field, you will active (put focus on) that field so you can complete it.

> **Note:**
> ***When you are on a Main Menu screen or a Setup screen, you can press and activate your choice's underlined letter with*** **or without** ***the Alt key. This works*** **only** ***on Main Menu and Setup screens.***

> **Hint:**
> *Sometimes the underlines do not appear until you press Alt. This is true in some menus, for example.*

Tool tips, sometimes called "pop ups," are short messages attached to toolbar icons. If you point to any toolbar icon, the tool tip will appear in a moment giving you the name of the icon and its keyboard shortcut, if there is one.

Menu commands that have keyboard shortcuts show the shortcut immediately after the command name.

Menus

The option mentioned above for using Alt with an underlined letter also works for menus, but it behaves a little differently. There are also a couple of other menu options to consider.

Menus appear near the upper left of a screen, just below the screen title. There is often a File, View, Edit, and Help menu, although this varies from screen to screen.

To open a menu with the keyboard, press and hold Alt and press the underlined letter of the menu you want to open. For example, Alt+E usually opens the Edit menu.

> **Hint:**
> *The underlines may not appear until you press Alt.*

To close a menu again without executing a command, press Alt by itself.

Once a menu is open, you can press LeftArrow and RightArrow to move from one menu to another. You can press UpArrow and DownArrow to move through the commands within a menu. To execute a command, arrow to it and press Enter.

The underlined letters within a menu offer a second option for executing menu commands. If you have opened the menu with Alt and the underlined letter, you can then activate a particular menu command by pressing its underlined letter *without* the Alt key. (Do not press Alt a second time.)

Note:
If you press Alt a second time, it will close the menu.

Type Ahead

A drop-down list is a field with a set of predefined options from which you can choose. It has a small down-arrow to the right of it. Drop-down lists offer a feature called “type-ahead.” If you know your choice, simply type its first few letters. As you type, the program will show you the first option that matches what you have typed.

Hint:
Drop-down lists also allow you to press DownArrow or UpArrow to toggle through the choices. You can “open” the list to see the available choices by pressing F4. All of these options (type-ahead, DownArrow, UpArrow, and F4) will work in combination with each other.

Common Keyboard Shortcuts

Press	To
F1	Display Help
F4	Display the items in a drop-down list or open a select screen.
Alt+Underlined Letter	Activate a choice with an underlined letter
Tab	Move to the next field or option
Shift+Tab	Move to the previous field or option
Ctrl+Tab	Move to the next tab on a screen
Ctrl+Shift+Tab	Move to the previous tab on a screen
Esc	Exit a screen
Ctrl+A	Add a record
Ctrl+D	Delete a record
Ctrl+E	Edit a record
Ctrl+S	Save changes from edit mode
Ctrl+Q	Cancel changes from edit mode
Ctrl+P	View the prior record
Ctrl+N	View the next record
Ctrl+H	Activate the Search icon
Ctrl+O	Activate the Show/Hide icon
Ctrl+R	Activate the Print icon
Ctrl+W	Activate the Preview icon
Alt+T	Activate a Select button
Alt+C or Esc	Activate a Cancel button
PageDown	Move to the next step in a wizard
PageUp	Move to the previous step in a wizard

Common Types of Fields

Field	Keyboard Shortcut
Search For	Type an entry and press Enter
Drop-down list	Use any combination of type-ahead, F4, DownArrow, or UpArrow
Lookup icon	F4
Checkbox	Spacebar
Radio Button	Arrow keys

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